History News

AMERICAN ASSOCIATION FOR
STATE AND LOCAL HISTORY
Volume 42 / Number 3
May / June 1987

The magazine for historical agency and museum professionals and volunteers

FOUR DOLLARS

Using economic figures to make the case for history
Two state agencies tell you how

Director Lois Shepard tells how to get an IMS grant

Interpretation at English country houses

Serving new audiences through outreach materials

FROM THE DIRECTOR

Last Things

Forgive me if, in my last editorial as I leave the Association, I don't declaim about Congress, the field, or its needs. Let me speak instead of the *A. J. Morris*, the *E. B. Brown*, and the *Traci K.*

Such are the names of river tugboats that have daily plied the Cumberland below my office window, maneuvering great barges of sand to be unloaded across the way. Sometimes, as I've talked with you on the phone, or responded to a letter you've sent, I've glanced out to see how things were going for them.

Sometimes also I've wondered if their "captains," in their high-up pilot houses, knew what I know—namely, that alongside them on the river are ghost vessels. Specters of steamboats that once brought wholesale goods to these banks for storage in warehouses like the one now converted into offices for AASLH. Phantoms of flatboats that even earlier brought the settlers of Nashborough to this river shore.

I've studied my local history, you see.

Oh yes, I know where Andy Jackson's old law office once stood up the street, not far from where the Association's legal counsel labors today. And a metal marker on the telephone building provides a seemingly eternal reminder that thereabouts occurred the first marriage in the settlement between "Captain James Leiper" and "Miss Susan Drake."

As I've walked the riverfront at lunchtime or after work, sometimes mulling personal matters of my own, I've often thought of them. Did they court right here? Did they feel the emotional pull of this ever-moving current? Was this their river, too?

For I've learned a lot in fourteen years with AASLH. I've learned to commune with history, not just study it. Your sites, your museums, your old houses, and the other relics for which you care, they enable people like me to do that, to feel the way things were, to sense the reality of life beyond one's own, to "see" the flow.

For history is a kind of human communion, without which the present is deceptive, merely a flat facade. After I am long gone, and at least parts of the *A. J. Morris* and the *E. B. Brown* are in museums, I hope someone else will look out on the waterfront and say:

"A national association headquartered here years ago. Thanks in part to it, history is still alive."

If so, he or she may feel a strange little tug at the elbow. Because right there, unseen, but nodding joyfully, will be Jim Leiper, Susie Drake, and me.

Jerry George

The American Association
for State and Local History

. . . helping museums and historical agencies save and use significant historical resources. . .

Membership in AASLH brings you a subscription to the bimonthly HISTORY NEWS magazine and the monthly HISTORY NEWS DISPATCH newsletter and discounts on AASLH publications and educational materials. As an AASLH member, you will also receive invitations to annual meetings, voting privileges, and announcements of professional seminars and other educational opportunities.

Join AASLH today.

Together we can do our work in history better.

YES! I need the best, most up-to-date NEWS on the world of historical societies, museums, archives, and libraries.

Sign me up for: ____ new membership ____ renewal membership

____________________ membership number

☐ individual membership ($40)
☐ student membership ($25). (Send a photocopy of your valid student I.D. card.)
☐ senior membership, 65 or older ($30)
☐ Enclosed is $1 (in addition to my membership dues) to support AASLH's lobbying efforts.

Write or call AASLH, 172 Second Avenue North, Suite 102, Nashville, Tennessee 37201, (615) 255-2971, for institutional and library membership rates.

Please accept my gift or pledge of $______to the William T. Alderson Internship Fund.
☐ Enclosed is my tax-deductible gift.

Name ____________________

Address ____________________

City ____________ *State* ____________ *Zip* ____________

Museum Visitor Evaluation

by Ross J. Loomis

Cloth. 328 pages. Charts. Index. Bibliography.

The essential handbook that shows you how to learn who your visitors are and why they come to your site or museum. *If you want more visitors — you need this book!*

On Doing Local History

by Carol Kammen

Paper. 180 pages. Index.

An early review of this book says, "It is unpretentious, readable, and full of common sense . . . it belongs in the library of every local and public historian!" (*Newsletter,* California Committee for the Promotion of History.) *Buy it . . . we think you'll agree.*

Local Schools Exploring Their History

by Ronald E. Butchart

Paper. 124 pages. Index. 39 photographs.

When was the last time you took a look at that venerable institution that taught you to read and write ...to think? Well think now about the opportunities that abound for local history projects on the topic of education and schools. *This book is a goldmine of useful ideas.*

Special Offer on New Books from the AASLH Press!

Please send me:

____ copies of *Museum Visitor Evaluation* at $17.95 each. $____________
____ copies of *On Doing Local History* at $10.95 each. $____________
____ copies of *Local Schools* at $9.75 each. $____________

☐ I am an AASLH member. My membership number is __________. Please bill me (AASLH will add postage and handling charges).
☐ I am an AASLH member. My membership number is __________. My check for $__________ is enclosed (AASLH pays postage on prepaid orders from AASLH members).
☐ I am not an AASLH member. My check for $__________ is enclosed (including postage and handling charges of $2.00 for first book and $.50 for each additional book).

Name ____________________

Address ____________________

____

City ____________ State__________ Zip____________

HN5/87

THE SPIRIT OF AASLH
More Help You Can Really Use!

PLACE
STAMP
HERE

Membership Manager
American Association for
State and Local History
172 Second Avenue North, Suite 102
Nashville, Tennessee 37201

Place
22 Cent
Stamp
Here

American Association for
State and Local History
172 Second Avenue North
Suite 102
Nashville, TN 37201

History News

MAY / JUNE 1987
Volume 42 Number 3

Cover: *The Museum of History and Industry* takes history to Seattle teachers, schoolchildren, and other residents through outreach packets. One packet is entitled "Changing Scenes of Downtown Seattle: 1850-Today." Shown on the cover is Pioneer Square in 1900. Photograph courtesy of the Museum of History and Industry. For a story on educational outreach packets, see page 36.

HISTORY NEWS (ISSN 0363-7492) is published bimonthly by the American Association for State and Local History, 172 Second Avenue North, Suite 102, Nashville, Tennessee 37201. Second-class postage paid at Nashville, Tennessee. Postmaster, please send form 3579 to HISTORY NEWS, AASLH, 172 Second Avenue North, Suite 102, Nashville, Tennessee 37201.

The American Association for State and Local History is a nonprofit, educational organization dedicated to advancing knowledge, understanding, and appreciation of local history in the United States and Canada. It publishes HISTORY NEWS, HISTORY NEWS DISPATCH, books, technical reports, and other materials; confers prizes and awards in recognition of outstanding achievement in the field; and carries on a broad educational program and other activities designed to help members work more effectively.

Members of the Association receive the bimonthly HISTORY NEWS, the monthly HISTORY NEWS DISPATCH newsletter, periodical Technical Reports, and a special discount on all Association publications. Membership contributions are $40 for individuals, $55 for libraries, and $55 and up for institutions. Applications for membership should be addressed to the Association, 172 Second Avenue North, Suite 102, Nashville, Tennessee 37201.

LETTERS

Crow Wing's response

I was amused to note that we were the small organization used as an example in Gerald George's 1986 speech in Oakland. (See "Report of the Director," March-April 1987 HISTORY NEWS.) That was a meeting that I wanted to attend, but the budget was tight. Somehow, if you had leaked that detail of the speech, I would have found a way.

I met Mr. George briefly in 1984, when I was also the "lone professional" at the Pipestone County Historical Society, located in very rural southwest Minnesota. Since 1985, I have been in Crow Wing County, central Minnesota, where the society seems to appreciate my generalist approach more than the previous society.

Over the last six months, we have added approximately 200 new members, putting us around the 800 mark, ahead of a few "larger institutions" that I am familiar with in Minnesota.

Our exhibits have progressed fairly well, and storage, collections, and archival problems come pretty nicely. My registrar, librarian, collections people, and some secretarial help are all volunteers, up to 79 years old. The best of them get promoted to a "department head" although it is still part-time staff. I also have a talented paid staff, with a full-time maintenance man who can research and do any repair, almost; and a part-time secretary-bookkeeper.

I have been active in the Minnesota Association of Museums and serve on a program committee on newsletters and am on a panel to discuss volunteer programs. Locally, I am a member of the county volunteer coordinators and work with community-wide volunteer coordinators for recognition and workshops. Voluntaryism has played a key role here due to a strong Retired Senior Volunteer Program. We also like cooperative ventures, such as a "Know Before You Throw" seminar we cohosted last year, at which David Nystuen of the Minnesota Historical Society staff was the keynote speaker. We also visit schools some, as do our volunteers.

Our board of trustees worked for a 20 percent increase from the county as of January 1. Also, we may open a historic site-interpretive center with the Corps of Engineers and our neighbor county society, Cass, as partners.

In the past, I have interned with Reed Whitaker in Kansas City and Roger Bridges in Springfield, Illinois, and studied under William Seiler at Emporia Sate University in Kansas. I have had more formal training in archives, oral history, and American history than in museology, which has been "on the job" thanks to the Minnesota Historical Society, AASLH publications and the 1984 meeting, and an AAM-ALI-ABA Legal Administration course in Chicago.

I have learned a lot from trying to keep the members of one society and the general public in one "tent." Principles, policy, and a clear conscience are sometimes the best tools for the job of director. Curiosity and awareness are the other two.

All this comes to the question of why were we, the Crow Wing County Historical Society, chosen as the "small potato." We will always be loyal to AASLH, even though we sometimes feel like a "poor relative" at larger gatherings. Not every organization can operate a 12,000-square-foot museum on less than $50,000 annually. I hope that is why you compared us to the Colonial Williamsburg Foundation. Besides, it is a joy to do something as well as the Rockefellers. They should see *our* renovated jail-sheriff's residence, which is operated without a set admission fee.

JEFFERY E. ALLEN
EXECUTIVE DIRECTOR
CROW WING COUNTY HISTORICAL SOCIETY
BRAINERD, MINNESOTA

Anomaly in the history field

Two statements in your March-April issue of HISTORY NEWS point up an anomaly in the world of historical agencies. On page 30 ("Field Notes for the Curator"), we are told that the cost of the Stamford Historical Society's exhibit "was underwritten by the IBM Corporation." Two pages later ("Field Notes for the Administrator"), we are told not to buy an IBM-PC, but to save $600 and buy a generic IBM clone built in Asia. I, for one, have yet to see a single exhibit underwritten by a generic-computer-building Asian company. Shouldn't we be supporting one of the hands that feed us?

DAVID W. CARMICHAEL
COUNTY ARCHIVIST
WESTCHESTER COUNTY RECORDS
CENTER AND ARCHIVES
ELMSFORD, NEW YORK

Send in the clones?

A "Field Notes" item in the March-April issue of HISTORY NEWS advocates the purchase of relatively low-cost generic copies (a.k.a. "clones") of the standard-setting IBM-PC microcomputer family as an economical route to computerization. You owe it to your readers to qualify that advice with several prominent cautionary postscripts.

The fledgling computer user, toward whom this "Field Notes" item seems to have been directed, might be in for several unpleasant surprises as the purchaser of a generic "house brand" or "clone" microcomputer from a distant mail-order discount distributor. That entry-level user is likely to need some guidance—frequent, reliable, intelligible, and sympathetic—in order to get the microcomputer set up, turned on, and applied to the performance of useful chores. Such assistance can sometimes come from friends and colleagues who are "computer jocks" or can sometimes be acquired through courses at a local community college or adult education program. Some specialized training programs for entry-level computer users are offered from time to time as workshops sponsored by regional museum associations. Contrary to common expectations, however, the needed assistance is rarely to be found in the printed manuals (if any) that accompany a newly acquired computer. These tend to be written in "techno-babble," a dialect that seems reminiscent of English but which loses that resemblance when one attempts to understand it in depth or in detail.

The most helpful source of step-by-step assistance and advice relating to a specific user's problems with a specific make and model of computer is often the retailer from whom that machine was purchased.

If that retailer is the proprietor of a local business, he or she will be anxious to satisfy customer needs on an individualized basis. The distant discount house, on the other hand, must depend on large sales volume and really cannot take time for individual hand-holding. If, for any number of reasons, "the thing doesn't work," and the user is uncertain as to whether the problem resides in a Taiwanese computer sold by a Chicago mail-order house, an Italian printer bought from a discounter in Los Angeles, or a program disk copied from a copy of a copy that a friend bought from Captain Hook's Software Emporium in South Miami, where does one go for solace or for help?

Eventually, every machine will suffer some minor or major malfunction. What then? The odds are the seller of mail-order "clones," if still in business, has no service department. A local sales and service facility is very apt to grumble discontentedly when someone drags in a machine that wasn't bought there and asks for repairs. At best, the service company will do the job and charge a stiff premium price to make up for the profit lost on the initial sale. At worst, the company will look at the computer, ask "whazzat?" and explain that it has neither the parts nor the know-how to make the necessary repairs. Despite superficial similarities of appearance and performance, all clones are not created equal.

It's true, of course, that most clones come with warranties comparable to those of major name-brand microcomputers; but let's remember that a warranty is no better than the company and the company representatives standing behind it. The fellow in the trench coat who sells Rolex look-alikes for $5 will probably give a guarantee to anyone who asks for it. For $5 extra he might offer a lifetime "extended service contract," but where are you going to find him when the thing stops ticking?

Even when a warranty is 100 percent valid, it may offer scant comfort if the nearest warranty service center is half a continent away. In such a case, the owner is faced with the choice of seeking local repair service (and such "nonauthorized" service would void most warranties) or sending the machine (at considerable cost of packing, shipping, and insurance) to an electronic never-never land for an extended and unpredictable length of time.

It should be noted that a great deal of price-centered advertising (for clones and name-brand computers alike) focuses on models with single floppy-disk drives. In general, these are better suited for use as small boat anchors than as serious data management tools. They will perform most basic "number crunching" and "work crunching" tasks, but often with maddening slowness as one fumbles with the location, insertion, removal, and storage of program disks, data disks, backup disks, and utility disks. A unit with two floppy-disk drives, usually costing about $200 more, will save much time and frustration. A unit with a hard-disk and floppy-disk drive, costing about $500 more than the most basic model, is light-years beyond the lesser machines in performance and "user-friendliness" and is the only choice that should be considered today for institutional or professional use. The cost differential, besides being well worthwhile in terms of performance, is truly trivial when figured as a daily cost over the useful life of the machine.

As a veteran of a number of microcomputer purchases (both personal and institutional; both "name-brand" and "clone"; and from both mail-order and local retail sources), I would suggest that the more rational approach to cost-cutting is to find a machine that will suit your current and anticipated needs and which is sold and serviced by a nearby firm—preferably one that has been around for at least a few years and enjoys a good reputation for its service and user support. The cost is likely to be 15 to 25 percent higher than what might be paid for the same machine from a "rock bottom" mail-order discount house; but, for the entry-level user, that extra cost will be worth every dime in terms of assistance provided and ulcers avoided in the course of set-up, testing, instruction, warranty service, and post-warranty repairs.

The more advanced computer user, who has been through set-up procedures before, who is familiar with the fundamentals of the MS-DOS or PC-DOS operating system, and who may even be able to undertake trouble-shooting and simple repair or maintenance work, might be well served by generic machines shipped from afar. For the beginner, the initial monetary savings are not likely to be worth the risks or the inconveniences.

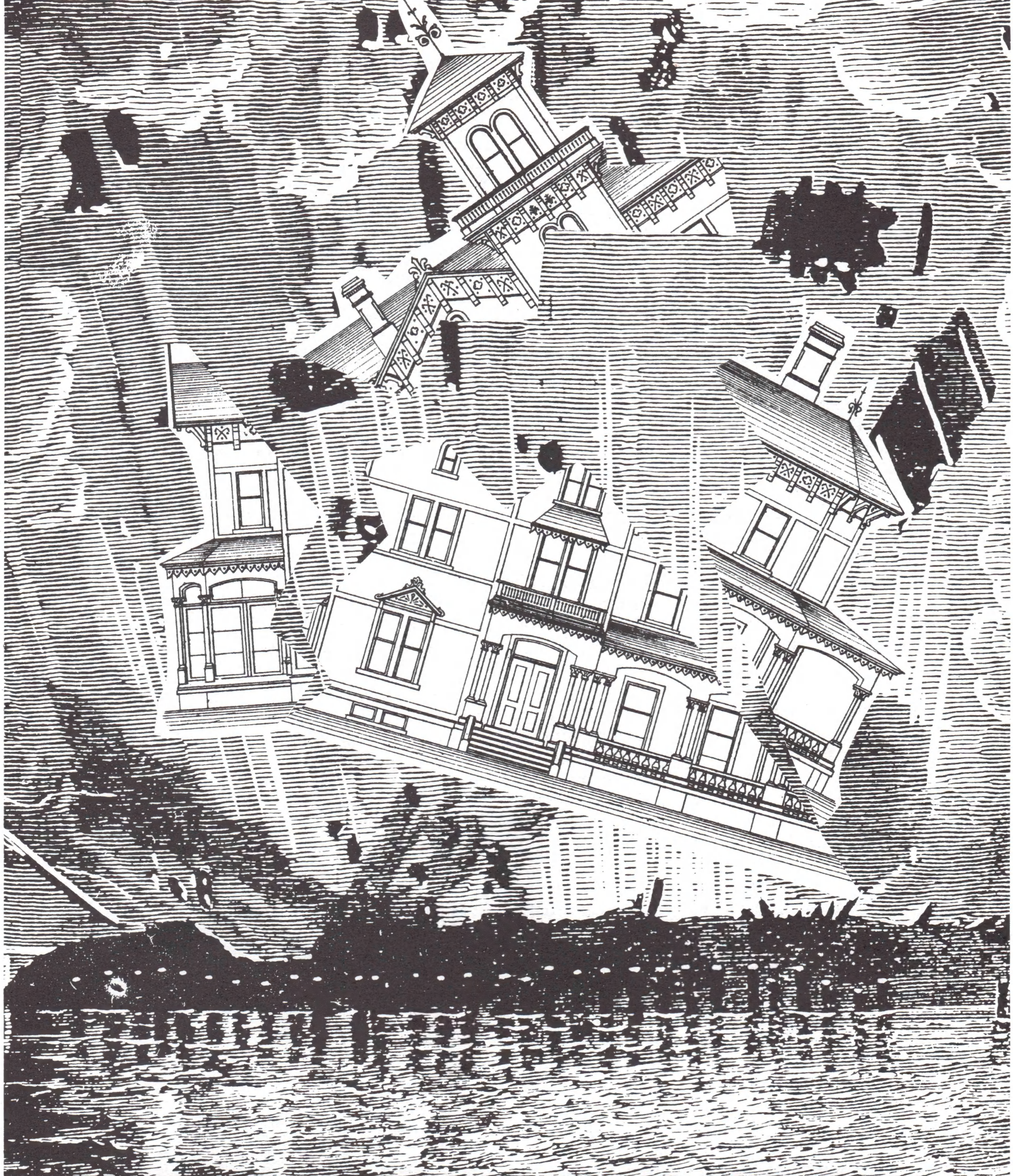
RON KLEY
PRESIDENT
MUSEUM COMPUTER NETWORK
EAST WINTHROP, MAINE

Help with centennials

As the chief of staff for the commission working on Washington's 1989 centennial celebration, I found Michael J. Devine's article ("The Bicentennial as History," November/December 1986 HISTORY NEWS) a useful guide and a welcome reminder of what this enterprise is all about. I am sure my colleagues working on the centennials of Montana and North and South Dakota (all 1989) and Wyoming and Idaho (in 1990) will be glad to have this distillation of his experience as well.

Readers of HISTORY NEWS will, of course, have a chance to see how well we have taken his advice to heart when AASLH meets in Seattle in 1989. There should be plenty of centennial activities afoot by then.

PUTNAM BARBER
EXECUTIVE SECRETARY
CENTENNIAL COMMISSION
OLYMPIA, WASHINGTON



Battling Budget Cuts

The Texas Historical Commission Fights Hard Times with Economic Ammo

BY DEBBIE COTTRELL

When the bottom fell out of oil prices, Texas state government leaders scrambled to make ends meet with much smaller revenues than originally anticipated. With an economy closely tied to the petroleum industry, legislators saw the budgets of state agencies as prime targets for spending cuts. The Texas Historical Commission, a small state agency mandated as the official commission for historic preservation in Texas, was just as vulnerable as the approximately 250 other agencies. We (staff and preservationists across Texas) knew our agency was important; we knew it was cost-efficient and even revenue enhancing; and we knew its $1.85 million annual budget was but a drop in the bucket of state spending . . . but these facts were not enough to persuade legislators to continue appropriating funds for the commission. It became clear that our agency needed to gather some specific facts and statistics and put them to use across the state—if we intended to keep our budget and programs intact.

Direct and indirect impact

Our stockpile of economic ammunition needed to show clearly how cuts to the THC would be bad for preservation *and* bad for the state's economy. First, we pulled together the direct positive economic figures that various THC departments had generated. The Main Street Project had seen dramatic increases in sales tax revenues since it started working with small communities across Texas to revitalize downtown areas. We acquired the figures to show these increases from the State Comptroller's monthly computer print-outs. Main Street also was responsible for new jobs and new businesses in selected communities. The numbers to prove these facts were available in records kept by managers in the Main Street cities; these records covered new business starts, business closings, rehabilitation costs, and new jobs. Project Director Anice Read had the figures from these records in the monthly reports submitted to her by the managers.

Debbie Cottrell is the director of publications for the Texas Historical Commission in Austin. She prepared this article with assistance from Curtis Tunnell, executive director of the commission.

Next we turned to reports and figures from THC's Architecture Division, which administers the federal Investment Tax Credit program in Texas. The division had cleared the way for hundreds of millions of dollars in private rehabilitation work across the state. Figures on the annual value of rehabilitation of landmark structures were compiled from Historic Preservation Certification Applications, filed in the State Historic Preservation Office (SHPO). The Office of the State Archaeologist, too, had figures we could use. The office had received outright donations and conservation easements on several important pieces of property—worth millions of dollars. To determine the value of archaeological properties, we used actual appraisals of land values, for tax purposes, plus the estimated cost of recovering the data and collections from the sites.

Beyond these direct effects on Texas's economy, nearly every THC department had indirect impacts on the state's economy. For example:

- Tourism is touted as the up-and-coming industry—perhaps salvation—for Texas. Based on data from the Texas Tourist Development Agency, tourism is a $16 billion industry in the state. Historic sites are a prime tourist attraction, according to figures available from *Southern Living* magazine, the Texas Tourist Development Agency, and the state highway department (the highway department gathers useful tourism data at entrance stations on major highways leading into the state). The THC's State Marker Program, one of the more ambitious in the nation, contributes to the tourism industry by commemorating sites that tourists are attracted to as well as by helping preserve these sites. The agency's National Register Department accomplishes the same goal.
- Museums also are drawing cards for tourists. The agency's Field and Museum Services Department helps small museums by offering technical advice and administering a small grants program. The department had done a survey on museum visitors and had figures to show who was visiting the 600 history museum in Texas and how they were generating spending in the state. (A revision of this survey is underway. We now encourage museums to keep better attendance records and to distinguish between in-state and out-of-state visitors.)
- The agency's Review and Compliance Department works with federal projects in Texas to make sure negative impacts on cultural resources are held to a minimum. These federal projects generate billions of dollars in the state—but they can't be spent until this THC department clears them.
- Museum directories, historical marker guides, and a National Register catalogue have been produced by the THC's Publications Department and were available at nominal costs—another aid to historic sites and tourism.

Outside impacts

There were other indirect ways the THC was aiding Texas's economy—even outside of agency efforts. The state Parks and Wildlife Department maintains several historic sites—another draw for tourists. Even though Parks and Wildlife owns the sites, many were purchased and saved at the recommendation of the THC.

Major historic sites in the state—such as the Alamo and the Governor's Mansion and the State Capitol—were not directly affiliated with the THC, but they represented the state's history. And, the THC was legislatively responsible for this history. Through project reviews, application of standards, grants, research and marking, and preparation of plans, the THC had been directly involved in preservation efforts at thousands of historic sites for more than three decades. Their tourism figures reflected the overall efforts—and dividends—of the THC.

Crunching numbers

With the above statistics in hand, THC staff needed to put them into a format that could be taken to legislative hearings and preservation meetings, as well as be handed to individuals and taken into communities. A few parameters were quickly established. First, we determined that all efforts had to be cost-efficient—that is, produced in-house by the agency's Publications Department. We also wanted to follow methods that were professional and testable. Graphs had to be accurate; facts had to be current. If we were going to put this material before legislators who were responsible for determining the agency's budget, there was little margin for error. We decided to include footnotes citing data sources on graphs and other visual materials to lend

credibility and to help answer questions. We found that the more specific the data, the better it is accepted. And last, we wanted to produce the report in a format that allowed for continual updates.

Within these parameters, we planned several production projects. The idea was to present multiple copies of the material in several formats to make it as adaptable as possible. Gradually, we developed the following materials:

- A general flier entitled "Preservation Saves." The flier featured artwork designed by a staff artist and included brief narratives on all THC programs and their economic impact in Texas. On the back panel of the flier, we used a graph to illustrate the exact dollar value of specific agency programs. Staff roughed out the graph, making sure all figures were based on the same time period, and the staff artist produced it to scale.
- This same graph was enlarged and reproduced on 8 1/2 by 11 inch paper. On the reverse side, the staff artist prepared *Southern Living*'s tourism figures (using a percentage scale), showing why tourists travel and showing that visiting historic attractions leads all categories.
- We enlarged the graphs of agency programs and *Southern Living*'s figures and mounted them on poster boards with colorful borders. During long legislative hearings, after lengthy testimonies from agency after agency, these posters have woken a few legislators up and quickly conveyed some important points.
- We established in the agency's newsletter a special column entitled "Preservation Saves." Featuring a logo based on a dollar bill, the column highlights a single THC economic impact each month. It reminds the newsletter's 2,000 plus readers that the value of preservation programs is ongoing.
- As the legislature returned to Austin for its 1987 session (perhaps one of the toughest sessions in the state's history due to the economic crisis), the THC devoted one entire issue of its newsletter to economics and preservation. With artwork and facts already prepared, this effort required little more than expanding and updating existing materials, yet it provided our economic facts in another format.

The results

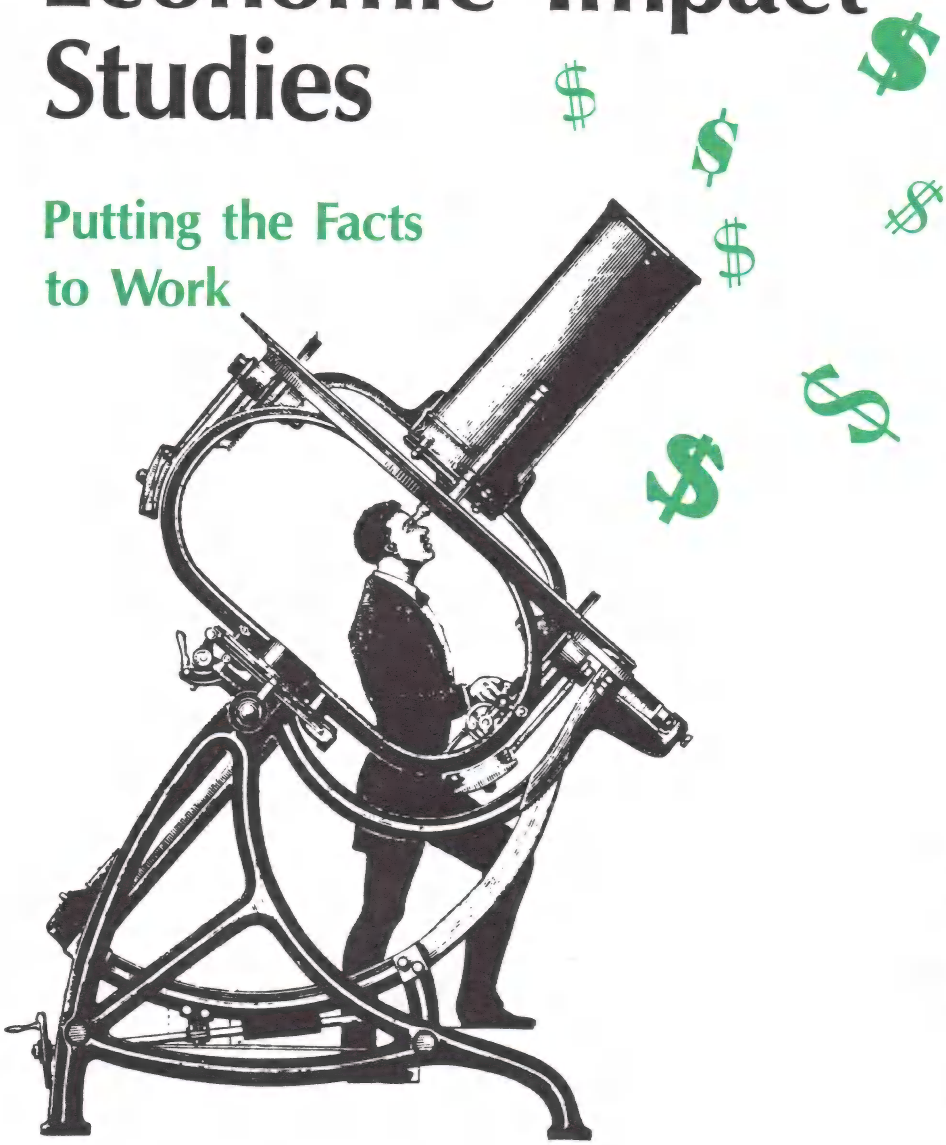
The agency's budget for 1988-89 is still being considered by the state legislature, so final results are not yet in. But the use of economic figures did help the agency avoid deep cuts for the current fiscal year (1987). Requests for our figures, fliers, and graphs come regularly from the public as well as from state legislators.

We used the economic materials extensively during a recent Preservation Day held at the THC. This event was sponsored by a nonprofit organization called Preservation Texas. Hundreds of preservationists from across the state came to Austin and visited their legislators in the capitol and invited them to brunch and tours at the THC (just a few blocks away). Preservation Texas and other private sources covered the expenses for food, name tags, and preservation fact sheets and other materials used that day. All of the agency's charts, fliers, graphs, special newsletters, and other materials were available on Preservation Day and gave people something to take with them as a reminder of preservation concerns in tough economic times.

Linking historic preservation and economic facts is not a new idea. Several years ago, a state leader said, "It's easier to pick a tourist than a bale of cotton." THC Executive Director Curtis Tunnell adds another perspective: "Beyond the direct dollar benefits of preservation is the more important goal of protecting the pride, spirit, independence, and quality of life that makes Texas unique. From the piney woods to the desert mountains, and from the seashore to the high plains, Texas has a very special history and a heritage worth preserving at any cost."

Economic Impact Studies

Putting the Facts to Work



HI$TORY must pay—that's the message historical agencies across the country are getting from their state legislators. Faced with revenue shortfalls—like the huge decrease in oil revenues in Texas and Louisiana over the past few years—legislators find themselves balancing not only the public benefits of the programs they fund but also the economic benefits. Return on investment is the name of the game historical agencies have been forced to learn, because when their services are measured against such public needs as road improvements or better schools or public housing, historical agencies must elaborate on their story of old—that they preserve the heritage of the state and improve the quality of life. Now throughout the country, such groups are documenting the case for their continued support.

Whether full-blown economic impact studies or straight-foward accountings of values of state properties, such as historical markers, of investments in historic preservation projects, and of tourists' dollars, these documents help legislators justify appropriations to historical agencies. Some state agencies have hired outside consulting firms to conduct surveys and write reports; others have gathered information from their own reports or those of state controllers.

To provide guidance in compiling economic impact studies and the type of information to include, HISTORY NEWS presents here excerpts from The Museum of New Mexico Foundation's 1986 economic impact study. Conducted by Av Shama and Associates of Albuquerque, the study cost $12,000, but Av Shama and Associates contributed $4,000 to the project, thus bringing the cost to the museum down to $8,000. From the museum's initial decision to conduct a study to the final report took three and a half months, according to Thomas Livesay, director of the museum.

The study covers the impact of visitors to three museum properties of The Museum of New Mexico, the impact of visitors to five state monuments operated by the museum, an analysis of how the museum's revenues and expenditures have a direct impact on the economy of the state, as well as information on how the museums and monuments attract and satisfy tourists to the state. Due to space constraints, the sections dealing with visitor satisfaction and motivation are not printed here. Asterisks indicate locations of material deleted.

$ $ $

Economic Impact of The Museum of New Mexico

Executive Summary

The Museum of New Mexico manages four museums, five state monuments, and a number of centralized professional services. Through these activities, the Museum enriches the quality of life in New Mexico. At the same time, the Museum makes an important contribution to the economic well-being of the state. This economic contribution, however, has never been quantified.

In order to quantify the economic impact of the Museum, The Museum of New Mexico Foundation has commissioned Av Shama and Associates to conduct a study, which focuses on a significant portion of its programs and activities. The study included:

- A survey of the economic impact of visitors to three Santa Fe museums (The Museum of Fine Arts, The Museum of International Folk Art, and The Palace of the Governors Museum)
- A survey of the economic impact induced by visitors to the state monuments (Coronado State Monument, Fort Sumner State Monument, Fort Selden State Monument, Jemez State Monument, and Lincoln State Monument)
- A survey of the impact of the Museum's revenues and expenditures.

The findings of this study show that with a general fund appropriation of $3.1 million in 1985-1986, the Museum gener-

ated or helped to generate:
• $244,790,327 in total economic impact on the New Mexico economy, or 79 times its state budget. This means that the Museum helps bring $79 to the state economy for every state $1 it spends.
• $11,997,760 in sales tax to the state annually, or roughly 3.9 times its annual budget. This means that every $1 spent by the state on the Museum helps bring about $3.90 to the state as revenues from gross receipts tax.

* * *

Methodology

To determine the economic impact of The Museum of New Mexico on the state, three different tasks were used to gather information. These tasks were:

1. A survey of visitors to Santa Fe museums to determine:
• The economic impact of the spending of visitors to three Santa Fe museums
• The degree of satisfaction of visitors to these three museums
• The part that these museums play in bringing tourists to New Mexico
• The demographics of visitors to these museums.

2. A survey of visitors to state monuments to determine:
• The economic impact of the spending of visitors to the five state monuments
• The degree of satisfaction of visitors to these monuments
• The part that these monuments play in bringing tourists to New Mexico
• The demographics of visitors to these monuments.

3. An analysis of the Museum data:
The purpose in this task was to analyze the Museum's information pertaining to its employment, income, expenditures, and number of visitors.

What is Economic Impact?

Arts organizations like The Museum of New Mexico pay wages and salaries to their employees and buy goods and services from a variety of vendors. The sum of these two factors is called *direct spending* or *primary impact*. The Museum's employees spend the bulk of their income on a multitude of goods and services, while vendors buy wholesale goods and raw materials and meet payrolls. These in turn trigger additional rounds of spending. These are called the *multiplier effect*, while the dollar sum of the rounds of spending triggered by the original direct spending is called *indirect spending* or *secondary impact*. The sum of both direct and indirect spending is called *total economic impact*. The sum of direct spending multiplied by the multiplier equals the total economic impact.

Visitors to The Museum of New Mexico spend money on food, lodging, tickets, and other purchases. Their spending is called *direct impact*, which continues to circulate in the economy and generates indirect impact. The sum of both direct and indirect impacts is the *total economic impact induced by the visitors*.

In a completely closed economic system where all the money stays within the local economy, the multiplier is very large. It decreases in economies or industries that depend on purchases from out-of-state. The multiplier of the arts of New Mexico is relatively large because in many cases it resembles a closed system.

While this is true, a precise determination of the multiplier of The Museum of New Mexico is a difficult and resource-consuming task. Studies of the economic impact of the arts in other states *estimated* the multiplier between 2.24 and 3.5. Estimates of the arts multiplier by arts organizations range from 2.5 to 4. The New Mexico Department of Travel and Tourism, which includes arts, uses a multiplier

of 2.17. The New Mexico Film Commission uses a multiplier of 3.0, while a more scientific study of 30 sectors in New Mexico reports an average multiplier of 2.5. It is felt that this average is the most realistic estimate of the arts multiplier in New Mexico, so it is used throughout this study.

Impact of Visitors to Santa Fe Museums

A total of 349 persons were interviewed at The Palace of the Governors, The Museum of Fine Arts, and The Museum of International Folk Art.

The survey was designed by the research and consulting firm of Av Shama and Associates (ASA) and was administered by museum volunteers trained in interviewing techniques by ASA. The interviews took place between August 29 and August 31, 1986.

Average Spending and Length of Stay of Visitors to the Santa Fe Museums

Category (per day/per party)	Non-Resident	Resident
Lodging	$ 51.08	$ 4.73
Food & Beverage	48.46	20.77
Purchases	74.07	18.30
Transportation	20.00	7.89
Recreation	9.56	4.93
Admissions	6.15	5.63
Other	3.77	1.09
Total (per party/per day)	$213.09	$63.33
Average Number in Party:	2.39	2.0
Total per person/per day	$ 89.16	$31.67
# days in New Mexico:	6.94	N/A
# days in Santa Fe:	4.03	1.4
Total Spending Per Person Per Visit★	$619.00	$44.00

★ Visit to New Mexico by out-of-state visitors; visit to Santa Fe by New Mexico residents.

Visitor-Induced Impact

The table above presents average spending by museum visitors on lodging, food, purchases, etc., as well as the length of their visits to Santa Fe and to New Mexico.

As can be seen in this table, the average spending per visit to New Mexico by out-of-state residents is $619; the average spending per visit to Santa Fe by New Mexico residents is $44. Multiplied by the total number of visitors, out-of-state and in-state respectively, these figures will provide the total direct impact of visitor-induced spending.

The Museum of New Mexico reports a total of 218,675 visits by out-of-state visitors and 58,129 visits by in-state visitors. Because visitors often visit more than one museum at a time, however, adjustments must be made for individuals who visit more than one museum or one museum more than one time. Based on the responses to the survey, it is possible to adjust the number of *visits* and get the number of *visitors*. Accordingly, the number of in-state visits is reduced by 32 percent and the number of out-of-state visits is reduced by 45 percent to yield the number of in-state and out-of-state visitors.

Therefore, the number of out-of-state visitors to The Museum of New Mexico is:

218,675 - (45 percent of 218,675) = 120,271

The number of in-state visitors to The Museum of New Mexico is:

58,129 - (32 percent of 58,129) = 39,528

Combining these visitors' figures with the survey results reported above on total spending per person per visit, the direct economic impact of out-of-state and in-state visitors can be calculated.

Direct Impact of Out-of-State Visitors:
120,271 x $619 = $74,447,749

Direct Impact of In-State Visitors:
39,528 X $44 = $1,739,232

Adding the direct impacts of out-of-state and in-state visitors to the Museum results in a *total direct economic impact induced by visitors to the Museum of $76,186,981.*

Taking the multiplier effect of 2.5 into account, the *total direct and indirect impact induced by visitors to the Museum is $190,467,452* (2.5 times $76,186,981). The resulting state sales-tax revenue from this impact is $10,237,625, or approximately 3.3 times the state contribution to the budget of The Museum of New Mexico (Santa Fe sales tax rate is 5.375 percent).

* * *

Impact of Visitors to State Monuments

A total of 148 visitors were interviewed at the five state monuments.

* * *

Visitor-Induced Impact

The table below presents average spending by visitors to the state monuments, as well as the length of their visit to New Mexico and Santa Fe.

As can be seen in the table, average spending per visit to New Mexico by out-

Average Spending and Length of Stay of Visitors to the State Monuments

Category (per day/per party)	Non-Resident	Resident
Lodging	$ 28.6	$ 7.2
Food & Beverage	28.1	22.2
Purchases	23.4	8.3
Transportation	24.1	11.5
Recreation	12.0	4.3
Admission	5.2	5.9
Other	2.9	0.7
Total (per party/per day)	$124.3	$60.1
Average Number in Party:	2.5	2.5
Total per person/per day	$ 49.7	$24.0
# days in New Mexico:	7.5	N/A
# days in Santa Fe:	0.9	N/A
Total Spending Per Person Per Visit	$373.0	$24.0

of-state residents is $373 per person. Average spending per visit to a state monument by in-state residents is $24 per person. Multiplying these figures by the respective number of out-of-state and in-state visitors will provide the total direct impact of visitors to New Mexico state monuments.

The Museum of New Mexico reports a total of 98,612 visitors to the state monuments in the past year. It is estimated that of this total, 77,904 are out-of-state and 20,708 are in-state visitors.

Because visitors often visit more than one monument during their visit in New Mexico, however, adjustments must be made for individuals who visit more than one monument or one monument more than one time. Further adjustments must also be made for those who visit a monument as well as the Santa Fe museums. Based on the responses to the survey, it is possible to adjust the number of *visits* to get the number of *visitors*. Accordingly, the number of out-of-state visits is reduced by 39.6 percent and the number of in-state visits is reduced by 89.9 percent to yield the number of out-of-state and in-state *visitors*.

The number of out-of-state visitors to the state monuments is:

77,904 - (39.6 percent of 77,904) = 47,054

The number of in-state visitors to the state monuments is:

20,708 - (89.9 percent of 20,708) = 2,092

Combining these visitor figures with the survey results reported in the table on total spending per person per visit, the economic impact of out-of-state and in-state can be calculated.

Direct Impact of Out-of-State Visitors:
47,054 x $373 = $17,551,142

Direct Impact of In-State Visitors:
2,092 x $24 = $50,208

Adding the direct impact of out-of-state and in-state visitors to the state monuments results in *total direct economic impact induced by visitors to the monuments of $17,601,350.*

Taking the multiplier of 2.5 into account, the *total direct and indirect economic impact induced by visitors to the monuments is $44,003,375.* The resulting state revenues from gross receipts tax is $1,760,135, or approximately 56 percent of the state contribution to the budget of the Museum. (The statewide average sales tax rate is 4 percent.)

* * *

An Analysis of Museum Data

The Museum information pertaining to revenues, expenditures, employment, and visitors is summarized in the table below. Most notable of these data for 1985-1986 are:

- A total of 276,804 visits to The Museum of Fine Arts, The Museum of International Folk Art, and The Palace of the Governors Museum, of which 218,675 are by out-of-state visitors and the remaining 58,129 visits are by New Mexico residents. (The total economic impact, direct and indirect, of these visitors is over $190 million.)
- 98,612 visits to the five state monuments, of which 77,904 visits are by out-of-state visitors and 20,708 visits are by New Mexico residents. (The total economic impact, direct and indirect, of these visitors is over $40 million.)
- 160 full-time jobs.
- Revenues of $4,127,800.

Taking the multiplier effect of 2.5 into consideration, the total economic impact generated by the museum's revenue and expenditures is $10,319,500. **HN**

1985-1986 Data of The Museum of New Mexico

1. Revenue Data:		
State Appropriations:		
General Funds		$3,125,800
Other Funds		898,200
Block Grant		103,800
	Total	$4,127,800
2. Expense Data:		
Salaries and Wages including benefits & payroll tax:		$2,974,000
Nonpersonal Expenses:		
Maintenance and Repair		138,500
Supplies and Materials		121,500
Contracted Services		536,800
Capital Outlays		204,800
Marketing and Advertising		6,500
Travel (in-state)		34,100
Travel (out-of-state)		6,000
Other Expenditures		89,300
	Total	$4,111,800
3. Employee Data:		
Permanent Full-Time Equivalent		126
Term Full-Time Equivalent		15
	Total	141
4. Number of *Visitors*★		
From New Mexico		120,271
From Out-of-State		39,528
	Total	159,799

5. Admission Ticket Prices:	*One Admission*	*2-day Pass*	*Annual Pass*
Adults	$2.00	$3.00	$10.00
Children 7-18 years old	$1.00	$2.00	$ 5.00
Children under 7 years old	Free	Free	Free

★Total number of *visits* are 276,804, of which 218,675 are visits by out-of-state visitors and 58,129 are visits by New Mexico residents.

How Do You Get an IMS Grant?

Director Shepard Faces Questions from the Field

In May, Lois Burke Shepard expects the annual barrage to begin.

As director of the Institute of Museum Services (IMS), she will announce this year's winners of federal grants to museums for General Operating Support (GOS). She may receive some thank you letters from museums that are funded, but the barrage will come from museums that are not. Such museum service organizations as AASLH also will hear from disappointed applicants. And if the calls and letters hold true to form, they will be something like this:

"I've been looking at the grant list, and I just can't figure it out. We've had GOS grants from IMS for three years in a row, and we're just as good a museum as ever, but all of a sudden this year we didn't get one. Not only that but hardly any museums in our state got a grant this time, and last year museums here got five. Of course, our region's biggest art museum got a grant again—and so did that struggling little history museum in the next state, which I advised as a consultant in the Museum Assessment Program that IMS also funds! So just what kind of crap shoot is this? Does IMS draw applications out of a wheel-of-fortune every year? Or does Lois Shepard use a dart board for choosing the winners?"

How will IMS answer such questions?

Because some of the questions will come from AASLH members, and because this is the tenth anniversary of IMS, a review of its procedures seems appropriate anyway. So HISTORY NEWS posed questions to which responses were provided, as follows, by Mrs. Shepard and IMS Program Director Ruth Weant.

Lois Burke Shepard

HISTORY NEWS: Let's start from scratch. Suppose I'm the director of the Old Hickory Historical Museum and want to apply for a General Operating Support grant in next year's competition. How do I find out when and where and how?

Lois Burke Shepard: If you have ever applied to IMS in any program, we will automatically mail you a copy of the booklet called *Grant Application and Information* as soon as it is available from the printer. If you haven't previously applied to IMS, all you have to do is request the booklet. The booklet includes forms for your application. When the 1988 edition is ready early this fall, it will give you guidelines for eligibility, how much money you can request, what you can use it for, and how you can apply for it.

Also, on the front of the booklet in large numbers you will find our program office telephone number, (202) 786-0539. We encourage you to call our staff with any questions that the booklet doesn't answer for your museum. It is also a good idea to call the program office in August to check on the application deadlines. Watch for our deadlines to be announced, about two months in advance, in museum association newsletters.

HN: Two months doesn't seem like a lot of lead time. Why can't you announce the next application deadline and send out the booklets now?

LBS: Every year we re-evaluate the guidelines in light of problems that may appear in the previous year's applications. Also, changes may be mandated in the program itself by the National Museum Services Board (NMSB), the policy arm of IMS, appointed by the president of the United States, or by Congress, which appropriates the money each year around September. We try always to announce the deadlines as soon as possible and to have the application booklets to the field not less than sixty days before the deadline.

HN: Let's suppose that my historical museum does submit an application this year. What exactly will you do with it?

LBS: When it arrives, the IMS staff will

first check the application for two things: Is your museum eligible and is the application complete? That is, is your organization really a nonprofit institution within U.S. territory that, for at least two years, has cared for and exhibited to the public objects that it owns or uses, in facilities that it owns or operates, under the supervision of at least one paid or unpaid staff member, or the equivalent in part-time or unpaid staff, who is genuinely responsible for the collections? And have you included all required application materials including proof of nonprofit status and financial statement forms?

HN: What happens if I forget something?

LBS: I strongly suggest that you don't! Your application can be rejected. This past year, however, the NMSB voted to have the program staff call all applicants with incomplete applications—more than 100 out of some 1,300 applications—and give them seven days to complete their submissions. We rejected only those that weren't completed within that additional week. That was, however, a one-time board decision, which may or may not be repeated. If I had spent the time required to fill out an IMS application, I certainly wouldn't count on it!

HN: If my application is eligible and complete, then what happens to it?

LBS: We enter the information on the application face sheet into our computer and check to be sure it's correctly entered. The computer, which also contains data on reviewers, will group your application with a dozen or so others from museums of the same budget size and discipline and assign those applications to four field reviewers. Each reviewer for your application (museum professionals in the field who have agreed to evaluate applications) will have professional experience in museums of the same discipline and budget size as yours. The IMS staff contacts all reviewers to be sure they can provide evaluations by our deadline and then sends applications and complete instructions to the field reviewers.

HN: How do you recruit reviewers?

LBS: By now we have a substantial pool of reviewers who have assisted in this process over the years. Last year we distributed a brochure to help us solicit applications from museum professionals to serve as reviewers. Although we have a substantial number of reviewers in some disciplines, we continually need to add professionals from all types of museums to the pool. We seek reviewers who have at least three years of experience and broad understanding of museum standards. We ask associations such as AASLH to help us solicit new reviewers, and every year we ask current reviewers—we had 408 this year—to recommend others. Reviewers are kept to a high standard. We carefully monitor performance, and each year we suspend some reviewers whose performance does not meet our standards. We encourage AASLH members who are museum professionals to call or write IMS for our application brochure.

HN: What will the four reviewers assigned to my application do when they get it?

LBS: Your application is carefully read by reviewers, usually three times, as we suggest to them. Using a score sheet with nine basic criteria to evaluate, each reviewer independently ranks your application with a score ranging from low of one to a high of seven and writes comments supporting each score. When we receive the score sheets back in the program office, we enter these "raw" scores into our computer, proofreading each score again for accuracy. Because some reviewers rate proposals generally higher or lower than other reviewers, the computer adjusts scores through a standard statistical process that, in effect, puts every reviewer's rankings on the same scale and transforms the raw scores into an adjusted score for each application. The computer then gives us adjusted scores for all applications ranked in numerical order from highest to lowest. Those with the highest scores eventually receive the grants.

HN: Are there any other human checks on this process?

LBS: Yes, several. Our staff reviews the field evaluations and the computer distribution, identifies possible scoring irregularities that might skew the status of particular applications unjustifiably, and refers those to a special panel for review. This special panel of eleven leading museum professionals from all sizes and types of museums in different geographical regions meets with staff to review the preliminary distribution of awards. Finally, the NMSB itself reviews the findings of the panel. The board then recommends the resulting award list to me as director, in whom our legislation vests final authority for grant approval.

HN: Instead of one live panel for special cases, the National Endowments for the Humanities and the Arts use additional live panels of evaluators to do what you seem to do with the computer after getting field reviews. Why doesn't IMS use more live panels?

LBS: We think our system is an objective way to apply the standards of the museum profession itself, defining "quality" as "how well you do with what you have." Moreover, with a staff of only eight people to process not only the applications for General Operating Support but also our Conservation Project Support grants and our Museum Assessment Program grants, we simply could not conduct as many extra panels as would be required to evaluate the number of applications we receive. Annually we process some 2,000 applications and administer almost 1,000 active grants. Our system seems, to us, both efficient and fair.

HN: Then how do what seem to be disparities occur? Why does a museum with grants two or three years in a row not get one the next year?

LBS: It is important to remember that each year is a new competition. I cannot stress that enough. No one should ever count on a grant until it is given. Each year, a museum's application will be assigned a different set of reviewers. Your application will probably be reviewed in a different group of twelve to fifteen applications, so it may face stronger competition in one year than in another. Changes in guidelines and evaluation standards can make a difference as well. Sometimes, particularly when a museum shows a budget increase in order to be eligible for a larger grant, its application may be grouped with larger museums than in a

previous year, which can give it tougher competition. Also, sometimes applications just look tired—that is, a museum may recycle a copy of last year's application, which shows no enthusiasm.

HN: Why do some museums that are widely recognized as "good" museums not get funded?

LBS: Sometimes "good" museums, taking their status for granted, submit poor applications. We ask reviewers not to take into consideration the general reputation a museum may have but to evaluate *only* what is in its application. Also, as a matter of policy, our system enables us to balance absolute merit against the need to help museums of all kinds and sizes. We wouldn't send your application from the Old Hickory Historical Museum out for field review in the same group of applications as Colonial Williamsburg, the Metropolitan Museum of Art, or the Bronx Zoo. We do not have quotas—so many grants for history museums, so many grants for museums of each budget size, so many grants for each geographical region. But by grouping applications from museums of similar types and sizes for evaluation, we can be sure that some of each type and size will be scored high enough by reviewers to make the final grant list. If your museum is ranked higher than others in the group in which your application is included for review, your likelihood of getting a grant is higher than it would be if you had to compete with a much larger museum on a totally equal basis.

HN: Why was it decided not to have a quota system, or alternatively a straight merit system, rather than a system that mixes the two?

LBS: The Congress created IMS to help all the kinds of museums—zoos, aquariums, botanical gardens, and science centers along with a great range of museums of history, science, and art. That requires a system that ensures distribution. But IMS also tries to use its relatively small grant funds to improve standards in the field and to help museums raise private sector funds. That means rewarding museums of each kind that show real merit and demonstrate excellence.

HN: Why do some states or regions receive more grants than others?

LBS: Thank you for asking. One of the greatest misconceptions about IMS's grant process is that awards are given by state. They are not. We announce grants by state to make it easier for Congress to announce awards to constituents. Having said that, it is also true that some states have more museums than others, some have generally stronger museums, some have longer and stronger museum traditions, and some simply have more museums that apply.

HN: Your maximum grant currently is $75,000. Wouldn't a lower ceiling result in spreading the money to more museums? What difference does $75,000 make to a large museum anyway?

LBS: Please keep in mind that the object of the award is to reward excellence in museum services and operations, regardless of the size of the museum. Although the money itself is obviously important to a museum, the fact that a museum receives a grant is vital to its fund-raising efforts in the private sector. Even for a very large museum, $75,000 can make the difference between whether or not a special project is undertaken, or a new system installed, or special staff position added. The NMSB reviews the grant ceiling annually and two years ago did raise it from $50,000. But there is also a minimum grant size of $5,000, which benefits the very small museums. Generally, grants are limited to 10 percent of a museum's nonfederal operating budget, but that operating budget may include the value of such noncash contributions as your volunteer's time.

HN: If a museum never has applied before, particularly if it is a small history museum, what real chance will it have to get a grant? What encouragement can you give to museums that may be put off by this description of a highly competitive system that employs both professional museum reviewers and seemingly cold computers to judge applications?

LBS: While not necessarily first-time applicants, about 15 to 20 percent of each year's grantees for General Operating Support are first-time recipients. We think that is a good indication that our process is not a closed system and that awards are fairly distributed throughout the field. It may take more than one try, but museums can increase their chances to receive a grant. I would hope that they would read and study the application form carefully. It is designed to help museums assess themselves and to prepare competitive applications. I would also encourage whoever has primary responsibility for filling out the form to ask for major input from other staff and trustees. Have them check to see that your museum has really made a strong case in the application itself.

HN: Whether applying for the first time, or reapplying next year, how can I improve my museum's chances of winning a grant?

LBS: First, remember that your peers in the field, not bureaucrats in Washington, are judging your application. Assume that strangers, with no knowledge of your museum except what they find in your application, are reading your application. Assume also that they are reading at least a dozen other applications from similar institutions. Then ask, how can you distinguish yours? You must persuade reviewers that your museum is special, more innovative or efficient than the others. Think of yourself as sitting at a table with four professionals from museums like yours—what could you tell them about your museum that would impress them, capture their attention? Then put that into simple, persuasive writing in the application. And be sure to fill the space provided in the application form with specific answers to questions about your museum! A reviewer may assume that a two-line answer means your museum hasn't much to say. Take special care also to explain fully what you do say, especially if you are doing or planning something unusual or controversial.

Finally, please take advantage of the help we offer. Ask us to send you samples of narratives from successful grant applications. If you've not been successful in a particular year, study the copies of field review evaluations that we send you. And call us for advice about anything that might help you understand the guidelines and produce a winning proposal. Our staff truly does try to help applicants who will just ask. And we do try to make our procedures fair. Thank you for the opportunity to explain. **HN**

Inside the Treasure Houses

The English National Trust Wrestles with Interpretation as It Attempts to Gain American Support

BY BRUCE HARVEY

Oh, those grand English country houses, so proud and so dignified, mind-boggling in their collections. They carry with them an image of beauty tinged with history and mystery. But is this history, mystery, and beauty conveyed to the many thousands who visit the houses? Can visitors, confronted with so much, really understand what they're seeing? In managing and caring for such houses, the National Trust for Places of Historic Interest or Natural Beauty in England, Wales, and Northen Ireland faces in extreme a problem that confronts every historic house museum in America: how to help the visitor understand and appreciate the legacy of totally foreign centuries.

I spent the summer of 1986 working with the English National Trust, surveying and evaluating the interpretation at approximately thirty of its historic houses. My project involved preparing a report on how the trust can use its properties and interpretation to generate support from Americans. This work also constituted the internship portion of my degree in applied history at the University of South Carolina.

The English National Trust is a vast organization. Founded in 1895, it is dedicated to preserving the heritage of England, Wales, and Northern Ireland. Although perhaps best known for its historic houses, the trust also acquires and preserves unspoiled and undeveloped countryside and coastline. With more than 1.3 million members and nearly two hundred historic houses, the trust is recognized around the world for its preservation efforts.

As a result of the spectacular success of the "Treasure Houses of Britain" exhibition in Washington last year, English

Bruce Harvey is a graduate student in the Department of History, the University of South Carolina. His project with the English National Trust was part of an internship program in historic preservation, administered by the U.S. committee of the International Council on Monuments and Sites and was funded in part by grants from the U.S. Information Agency and the Royal Oak Foundation, the English National Trust's American affiliate, located at 41 East 72nd Street, New York, New York 10024.

BRUCE HARVEY

A recent house to come to the English National Trust is Kedleston House, above, near Derby in central England. With much of the endowment yet to be raised, it is the focus of the trust's American development campaign. Lanhydrock House, opposite, in Cornwall faithfully reflects Victorian ideas of comfort and includes the servants' quarters.


BRUCE HARVEY

preservation and heritage organizations have renewed their interest in seeking financial support in the United States. According to the 1980 census, some 62 million people in our country, 27 percent of the population, claim British ancestry. Many Americans also recognize their cultural ties to Great Britain. In addition to sharing a similar language (though not exactly the same), students learning about early American history and the American Revolution obviously do so with reference to Britain. Ideas about politics, society, art, literature, and architecture came to early America by way of England at the time England's country house society flowered. These facts, combined with the tremendous financial burden of maintaining its large historic houses, led the trust to seek American sources of support. That quest requires marketing, which calls for thorough examinations of current policies and practices.

Is preservation enough?

As many recent articles stress, visits to historic houses or galleries are often the sole contact that the public has with any museum. The interpretation presented at such houses becomes an important part of public relations and marketing efforts. As with comparable preservation efforts in America, though, the English National Trust seems to sit back once the building or site has been saved and stop there. But if no one experiences what has been preserved, why preserve it in the first place? *Allowing* for public access is not enough, but making sure the public "experiences" this heritage is a more difficult task. The English National Trust, however, often views preservation as an end in itself.

One occasionally hears of country houses being "National Trust-ized," a damning comment that implies a monotony among trust properties. Country houses in one sense were meant to reflect the personal tastes of the architect or house owner. They also reflect the ages in which they were built. Because of this, many of the houses have a stylistic affinity. Both Stourhead House, near Bath, and Osterley House, outside London, for example, were built in the early- and mid-eighteenth century, and naturally they are similiar. Through interpretation the trust can accentuate the differences in both the original conception and historical development, thereby "de-trustizing" the properties to become distinct parts of the English heritage.

In several of its houses, the trust has already developed new presentations, including short orientation videos and exhibit rooms. At Montacute and Beningbrough, the National Portrait Gallery has lent pictures to fill spaces on the walls or gaps in the collections.

On a different plane is Barrington Court near Salisbury, a house with little original documentation and fewer original furnishings. The trust's solution, a controversial one, was to rent the house to a firm dealing in high-style sixteenth- and seventeenth-century furniture. To see price tags in a National Trust house was at first disconcerting, but the gallery is enjoyable to visit and a pleasant change from so many museum-like settings in historic houses. No visitor has trouble distinguishing Barrington Court from other trust houses.

Getting enough information to distinguish the houses is sometimes made more difficult by the trust's aversion to using docents. This is based on perhaps the major difference in preservation philosophy between the United States and Great Britain. In Great Britain, museums are seen as static places for exhibits, while historic houses are meant to be more "alive," like regular homes. Thus, the prevailing view in the trust is that the best interpretation is as little as necessary, and that visitors should experience the house without the interference of a tour guide. This leads to a more passive interpretation, reflecting the trust's philosophy that it is a preservation, not an educational, organization.

Interpretation, however, can make trust houses come alive. For visitors without a background in history, architecture, or decorative arts, understanding what is in the house is more difficult without the help of a docent. The tendency in the trust's houses, as well as in many American historic houses, is a direct or implied object-oriented approach; the visitor is there to look at things as objects of art. The objects should be important, but what will distinguish the houses is their historical and social context. Each house is unique in its context, and an interpretation should allow the visitor to understand *why* a particular type of furniture belongs in that house.

The trust's current method of provid-

ing information for the visitors, in addition to the orientation videos at certain houses, is through guidebooks. These have traditionally been fairly pedantic and unattractive, but they are currently being revised to include more of the social history of each house and what the trust has done to the house, all in a more attractive layout. With the new guidebooks and orientation videos, visitors should be able to understand better the houses and their contexts without assistance from tour guides.

An important part of providing a context for the interpretation is the method of furnishing the house. One approach the trust takes, which is also popular in the United States, is to furnish and interpret the house to a particular period. The most successful example of this that I saw was Cragside House, near Newcastle-upon-Tyne, which is furnished to the late nineteenth century, high Victorian period. Cothele House, in Cornwall, and Osterley House, near London, depicting the seventeenth and eighteenth centuries respectively, have also been done very well. At some of the trust's properties, where much of the original structures and furnishings are intact, the trust can manipulate the environment to give visitors a sense of what it was like to live in another time. At other properties this approach is difficult.

An important feature of the trust's houses is that they have all changed over time to reflect the tastes of new generations and different families. By removing all alterations and selecting just one period as a focus, the trust misses an opportunity to show how a house was altered to fit new life styles and technologies. Interpreting change is still relatively new at house museums in the United States, with the exception of places such as Strawbery Banke, which interprets 300 years of a community's history and buildings. The English National Trust is now considering how its properties can show the changes they have undergone. A formal way of doing this would be to set up each room to represent different periods of the house's development.

Perhaps more practical is the informal approach taken at Baddesley-Clifton Manor, near Stratford, and Wallington House, near Newcastle, both of which show a mix of furnishings and create the impression of a personal collection growing over the generations. This approach may help to bring out some differences among the houses, but if every house were to do this, the phrase "National Trust-ized" might take on new meaning. Obviously, an interpretation of each house depends on its unique context and resources. Another practical solution, which the trust already uses at Treasurer's House in York, is to explain structural changes through an orientation video. I found the program helpful in my attempts to make sense of the house. The show also made the house more interesting to me.

Life amid the treasures

Many visitors to historic houses in Britain, and in America, feel that the buildings are "dead" because it is so difficult to imagine anyone actually living there. Indeed, the rooms that the public sees in English country houses, especially in the larger ones, were never meant to be lived in. Much like the nineteenth-century urban American parlor, these staterooms of Britain's country houses were reserved for special occasions and notable visitors, often royalty. To bring such houses to life without guides requires finding some other way to inject a human context and to explain to visitors what they are seeing and how to view it.

These houses are monumental in scale, often overwhelming visitors. Many of the huge rooms are filled with furniture elaborately decorated in unfamiliar styles and objects the public may never have seen. The administrator of Knole House in Sevenoaks, Kent, gave me a good example of the reaction of some visitors to the onslaught to their senses. Knole is an enormous house with some of the most stunning seventeenth-century decorative and fine art imaginable, including the famous silver furniture displayed in the "Treasure Houses" exhibition. Yet some visitors go through the house in less than ten minutes. The house does not possess a "living" atmosphere where people want to linger. What, then, will the public remember of its visits and, hence, of the National Trust?

Americans in particular may have difficulty understanding much of what they see in an English country house and, therefore, may need extensive explanation. The "country house life" arose out of distinctly British social traditions. Even contemporary British visitors may have problems understanding these houses because the conditions that encouraged this kind of life style have largely disappeared since World War I. In fact, an important reason for the trust's involvement in country houses in the 1930s was that the economy and the population of "gentry" could no longer support these houses and their furnishings were being dispersed.

"Backstairs" interpretation

To show life as people actually lived it, some trust properties are making interpretive use of the "backstairs." The country house itself was often only a part of a nearly self-sufficient economic unit, which included barns, mills, and other buildings. Not only is it more interesting to show the variety of life surrounding the country house, it can also provide a fuller context for visitors by explaining how the economic system worked. The mill complex and the harbor at Cothele House in Cornwall and the Victorian laundry at Benningbrough near York are fully interpreted. At Erddig in Wales the focus is on the lives and experiences of the servants, based on extensive, detailed documentation that the family kept on its employees. At Lanhydrock House in Cornwall, the visitor confronts a spectacular array of ceramic bedpans. In different ways such interpretations and displays introduce the human element to trust houses.

Some may argue that visitors to National Trust houses do not care about understanding what they see but merely want to be awed by these magnificent estates and their collections. This often seems to be the case. However, many visitors do want to learn more about what they are seeing, and their wishes ought not to be ignored. House museums can be both educational and enjoyable, and when visitors understand better, they enjoy more. And they are more willing to contribute to the support of the house.

The English National Trust has resources—buildings, collections, and personnel—of which the administrators of most American house museums can only dream. The range of houses and facilities that the trust cares for is greater than nearly any other single heritage organization in the world. But the idea of an interpretation that provides a specific context for each property is one that applies to any historic house anywhere. The National Trust is highly successful at preserving Britain's heritage, and this emphasis should not and will not be sacrificed. With its current trends toward interpretive programs, I hope the trust can translate this success into greater support to preserve a past that many Americans share. **HN**

A A S L H

Technical Report 12

Technical Information Service American Association for State and Local History

How to Develop Effective Teacher Workshops

Peter S. O'Connell

If collections are the heart of museums, education – the commitment to presenting objects and ideas in an informative and stimulating way – is the spirit. As the American Association of Museums notes in its report, *Museums for a New Century*, American museums should communicate ideas, impart knowledge, encourage curiosity, and promote aesthetic sensibility. Museums and historical societies, then, should count among their most important functions the education of their many publics – children, teachers, families, and visitors.

Historical organizations can reach students most effectively by working with schools to help them teach an appreciation of the value of historic structures, a knowledge of the history of community and state, and the skills of "historical literacy" such as the ability to read objects and buildings, to use primary documents, and to map neighborhoods.

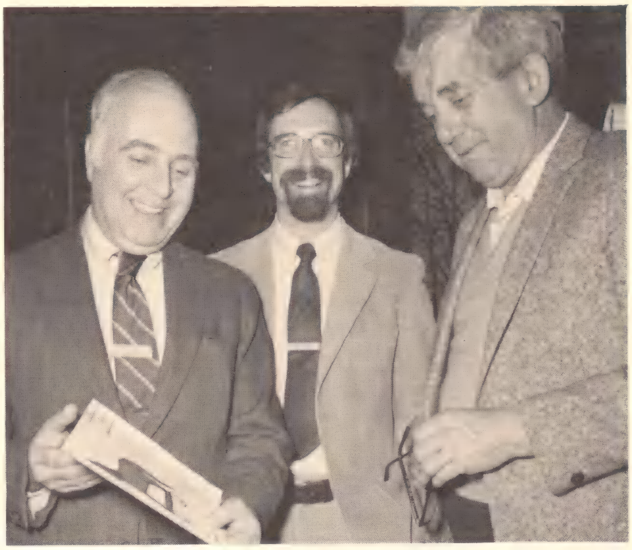
I suggest museums consider developing teacher workshops as a good way to begin long-term, successful museum-school collaboration. There are several types of teacher workshops, and the type you offer will depend on how far along you are in developing a new education program. For example, you might organize a workshop to solicit advice from teachers for a new program your museum wants to develop for schoolchildren. Once the program has been established, you and the teachers who helped you might offer another workshop to other teachers on the new program, one that trains them in the use of new sources and techniques. Some teacher workshops emphasize historical content and usually involve the presentation of historical information in didactic form – through a lecture, movie, or dramatic play, for example. Still others teach the techniques of historical inquiry by focusing on the methodology of oral history and archaeology or by acquainting teachers with the techniques of "reading" objects, spaces, or buildings. Most workshops include all of these objectives in some measure. But when museum staff members attempt to accomplish too much – when they fail to define realistic priorities – teachers feel overloaded, rushed, confused, and frustrated.

Defining the terms

What constitutes good museum-school collaboration? First, to work together, both museums and schools must speak the same language. Though both use such terms as "history," "exhibit," "curriculum," "object," "learning," "student," "teacher," and "teaching," and both assume that the words carry the same meanings, in reality a curator defines learning and teaching differently than a fifth-grade teacher.

When a curator develops workshops and educational programs, he or she naturally uses slide-lectures, tours, and other means familiar to museum

Peter S. O'Connell is director of museum education at Old Sturbridge Village in Sturbridge, Massachusetts, where he has developed many workshops for teachers. He earned his master's degree in teaching at Harvard University.



OLD STURBRIDGE VILLAGE PHOTO BY HENRY E. PEACH

Effective museum-school collaboration involves museum administrators, educators, and principals. Left to right, Crawford Lincoln, president of Old Sturbridge Village, Peter O'Connell, director of museum education at Old Sturbridge Village, and Al Radzik, principal of Elm Park Community School in Worcester, Massachusetts.

professionals. Curators often assume that teachers need the historical content museums offer but can develop their own teaching activities. Teachers see things differently. They think first in terms of practical classroom activities, and they rank intellectual stimulation lower in priority.

Good museum-school collaboration brings museum staff and teachers together in an atmosphere of mutual respect to learn about one another's "culture" in order to accomplish the goal they hold in common – the effective education of children.

Program research and planning

How does a museum begin developing a successful education program? Often a museum is tempted to pull together a program quickly, whip up a promotional brochure, send it to area schools, and offer a teacher workshop. As a museum educator, you should avoid such a temptation. First, you need to secure the support of your museum's board and administration and make sure they allocate sufficient financial resources. Often a museum's education programs begin with grant funds; they are not part of the museum's operating budget. But what happens when the grant period ends? Too often administrators fail to support education programs fully, but do not make that clear until the grants run out. Both the museum's director and its educator should analyze how the education program will become part of the institution's operating budget, supported like other museum programs and services by fees, general funds, and grants.

To gain the support of the society's board and director, you should demonstrate how the new program ties into the museum's mission statement, explain how the program helps the museum fill its educational obligations, and provide information about education programs in similar – and perhaps competing – organizations. And finally, you can remind the board that sucessful programs for schoolchildren often lead to increased family visitation.

Once you have the proper support, you can begin developing the program itself. Since the strengths of the museum's collections and archives define the possibilities of education programs, you must assess the collections. This analysis helps you map out the boundaries of your teacher workshops. Good workshops assume that some historical content and source materials have been refined from the raw ore of the collections. You must also decide whether school groups will be staff-led or teacher-led, since the decision affects the kind of training teachers need before they bring their students to the museum. Finally, you must "research the market." Begin by gathering information about local schools and talking with their administrators and teachers. In states with statewide curricula, ask for copies of curriculum guidelines. In other states, look for the guidelines produced by local school systems. A school's published guidelines, however, do not necessarily represent what goes on in the classroom. Only the teachers and administrators themselves can tell you that.

When you have completed the initial planning, you will be ready to choose program topics that draw on the museum's strengths and that meet teachers' needs.

Regardless of the topics, your education programs should include: classroom activities that tie into the curriculum and prepare students for their visit to the museum; a museum visit that includes activities that cannot be done in the classroom and that teaches skills as well as historical information; and postvisit activities that allow students opportunities to put their new skills and knowledge to use.

As you tentatively select historical sources and design teaching sequences, you will need some familiarity with curriculum theory and terms. If you lack such knowledge, consider hiring a curriculum consultant.

A workshop for teacher advisors

Once you have worked up some tentative programs, you might ask administrators and curriculum coordinators in the local schools for their reactions. Working through administrators is particularly important because you involve them at the outset, and they, in turn, are more likely to support your program. Get them to identify some teachers who would pilot the program, evaluate it, and help to revise it.

In implementing a workshop for teacher advisors, you should avoid viewing yourself as simply a content specialist who selects historical sources, trains teachers through lectures, and assumes teachers themselves can design teaching activities in which students learn complex historical ideas.

Begin the workshop with some discussion about the relevance of the program's topic to the teachers' curricula and to student interests and needs. Once you all agree on the topic, you can practice the program itself on the teachers. Playing the roles their own students will play, they learn new historical information and understand more clearly if a particular set of resources and activities will work for their students. The teachers can then tell you how to improve the activities, resources, formats, or teaching sequences.

Such an approach requires the skills and knowledge of a historian, a classroom teacher, a museum teacher, and a program planner – a person who can translate traditional historical methods and materials into exciting, learning experiences for students. Few historians or teachers can do it – it is the particular skill of museum educators.

Such planning workshops may vary in length from two hours to a few days, although they do not necessarily occur all in one sitting. Smaller museums may offer two-hour workshops, perhaps in a series. Many museums include behind-the-scenes activities to help the teachers feel more part of the museum.

From planning to dissemination

Now that you – with the help of teachers and administrators – have developed and piloted programs, you are ready to offer them to other teachers in a different kind of workshop.

Think of yourself as a salesperson for a product you believe in passionately. To succeed, you need to make teachers feel welcome and comfortable. You must show them that you are well organized before they ever arrive at your workshop. Send a letter to teachers who have registered for the workshop to let them know you are looking forward to working with them, to confirm the program dates, and to tell them the starting and ending time for the workshop. Enclose directions to your museum with information about parking, lunch, and any other details. For example, at Old Sturbridge Village, we tell workshop participants to dress comfortably, to pay attention to the weather forecast, and to wear shoes appropriate to our sandy pathways.

The tone of the workshop is very important. Teachers "read" people and spaces very well. Make sure that your space is comfortable, that restrooms are easy to find, that you welcome them with refreshments – coffee, tea, and breakfast snacks. Provide name tags and a schedule for the day. Work hard on your introduction to the workshop. The tags and schedule let them know you are organized, and

OLD STURBRIDGE VILLAGE PHOTO BY HENRY E. PEACH

As Anatole France explains in *The Colonial Williamsburg Interpreter*, "It is enough to open minds; do not overload them. If there is some good inflammable stuff, it will catch fire."

the introduction tells them that you are in tune with their needs and interests. Teachers look for opportunities to participate, for session topics that apply to their classes, and for workshops that have some breaks in the day. For many people, the social interaction among the participants may well determine the success of the workshop. Others may worry about lunch arrangements.

If the workshop lasts only one day or less, you must avoid the temptation to teach teachers everything at once. Anatole France explains in *The Colonial Williamsburg Interpreter: A Handbook:* "Do not try to satisfy your vanity by teaching a great many things. Awaken people's curiosity. It is enough to open minds; do not overload them. Put there just a spark. If there is some good inflammable stuff, it will catch fire."

In workshops at Old Sturbridge Village, our staff takes on the role of teachers and casts the teachers as students. We call this "model teaching": The teachers explore the materials and activities much as their students will, except that, for the teachers, the activities are shortened or "telescoped" because of limited time. The teachers experience a great deal of fun and satisfaction because the sources and activities are stimulating and relevant to their teaching needs. Of course, the staff and teachers discuss how the activities work with students.

We set aside some time in the workshop to go over logistical procedures with the teachers, so they feel well organized in bringing students to the museum and so our museum staff feel prepared to go to their classrooms.

If teachers in your workshop go through the program much as students will, they will learn a substantial amount of history and go away wanting more. And if teachers take away instructional materials, they will teach themselves more history.

A sample workshop

At Old Sturbridge Village we have developed an upper elementary curriculum unit that requires twenty class periods of instruction and a one-day field study at the museum. A workshop for teachers can last from one to five days, depending upon the school system's objectives, but generally, we attempt to familiarize teachers with the program in a one- or two-day workshop.

In a typical one day workshop, the sequence of activities might be as follows:

9:00	Coffee and Registration and Review of the Schedule
9:15	Activity: Your Own Family Life in the Twentieth Century

The first activity provides workshop participants with a chance to get to know one another and to develop concepts that form the framework for comparing family life in the nineteenth and twentieth centuries. We have had success with several activities. We might ask each participant to recall from memory a room from a childhood home and to focus on the relationships of people and objects in the room; or, we might ask each participant to make a quick floor plan of his or her house and to list the activities that occur in each room.

After processing the activity, the workshop leader establishes an overarching "focusing question" that

guides the teachers' inquiry during the workshop (and during the teaching of the curriculum unit with their students). Several focusing questions work well, but a good example might be: "What factors affect the structure and functions of families in the early nineteenth century and in the early twentieth century?" The question suggests more specific questions that need to be asked before answers to the broader question can be found.

9:45 Finding Yourself in the Past: Taking on New Identities as Members of 1830's Families

In this section of the workshop, we introduce a strategy that helps students learn in our museum. We assign participants the identities of members of 1830's families and instruct them to explore what their lives would have been like if they had lived in Sturbridge back then. The activity provides the teachers a comfortable way to learn about family history – through the eyes of an individual. There is something intriguing about another person's life. The members of the same family have a new basis of socializing and turn to the museum resources with a sense of interest and anticipation.

Teachers are asked to read a family census card and to introduce themselves in their new identities. The staff asks them to identify questions they would like to explore if they were to describe a day in their characters' lives in 1830 by the end of the workshop. They also begin to make observations about average family size, life expectancy, age at marriage, and length of childbearing years. In addition to assigning the roles, we give teachers edited primary sources, such as diaries or recollections, of people like their new 1830's selves.

10:30 - 2:00 Research in Museum Exhibits, Individual Planning Meetings and Lunch

We then send teachers to visit museum exhibits and to gather information. Before they set out, however, we give them some follow-up activities they can engage in (or engage their students in) after the field study. Having the follow-up activities in hand at the outset, the teachers know better what historical information they need. Such knowledge helps structure their unguided visits into the museum and maintains the focus of the workshop. Since they are on their own, the teachers feel in charge of their learning. They make a commitment to the process.

While some workshop participants explore the museum, others meet with an OSV staff member to plan their specific teaching unit. We ask about their teaching objectives, the length of the unit they have planned, and other factors. In this thirty- to forty-five-minute conversation, we try to help them structure a basic teaching sequence using already developed OSV curriculum resources, including an orientation slide program, role cards, and diaries, and teaching strategies such as object reading, inventorying the students' rooms, keeping a three-day diary, and role playing an 1830's school lesson. We try to be very specific and practical, to help teachers focus on their primary objective (teachers sometimes want to do it all, too), and to consider what will work with the students.

We must remember that we cannot promise too much in an effort to please the teacher. We have to stay within our capabilities and offer a program that will not strain our limited time and materials. It is better to do a limited program well than to fail at an overly ambitious one. If both partners, museum educator and classroom teacher, see this conversation as a beginning of a longer relationship, it is easier to limit the expectations.

Because we want to familiarize teachers with a curriculum on family, and more particularly to help them better understand what will happen when their students visit the museum, we sometimes ask them to do the same short hands-on activity we will eventually ask their students to do on their field study to Old Sturbridge Village. The activities are fun, but they also demonstrate students' needs for concrete activity in relation to the more abstract structure of the inquiry.

OLD STURBRIDGE VILLAGE PHOTO BY ROBERT S. ARNOLD

Active participation is an essential part of successful teacher workshops.

2:15 - 3:00 Summary of Field Study and Workshop Wrap-up

After the hands-on activity, the teachers discuss what they have learned about family life in the nineteenth century. They do not actually do the classroom follow-up activities they were assigned at the outset of the field study, but as a group they discuss the conclusions they might have reached if they had. The museum staff then reviews the remaining sources and activity materials in the kit and the teacher's curriculum guide.

Each of the activities builds on skills and learning accomplished in previous activities. By organizing the workshop around questions, we shift the focus of inquiry from the staff to the teachers and increase their sense of participation. Thus the museum staff members cast themselves as resource people to the teachers as teachers seek the answers to questions they have identified. The workshop experience is open-ended, relevant, and participatory. Teachers marvel at how much they have learned and appreciate the museum staff's ability to "teach."

We emphasize social interaction. Teachers learn a great deal from one another and draw substantial satisfaction and support from learning something new together. The museum staff becomes supportive of the teachers and grows to recognize their feelings of insecurity in a museum environment.

Such a workshop may seem overly ambitious for the small historical organizations. A substantial amount of the workshop time, however, involves teachers visiting museum exhibits and planning their class visits to the museum. If we left the visits out or shortened them, the workshop would last approximately two to three hours. Versions of the workshop have worked well as after school in-service workshops and as one-and-one-half hour workshops at teacher conferences.

Workshops on history and historical inquiry

Once your planning and dissemination workshops are in place, you might consider offering workshops that have as their primary objective strengthening teachers' understanding of historical topics or introducing them to the techniques of historical inquiry.

Formats for these kinds of workshops range from two-hour afternoon workshops to five-day or longer conferences and seminars. A museum can organize such a seminar or workshop easily and offer it frequently to the general public – and that sometimes presents problems. The museum might be tempted to invite teachers to participate in a program modeled after one of its public seminars even before it has developed education programs. In most cases, the museum finds it has made a mistake in doing so. Many teachers already think historical museums favor adults more than students and rely too heavily on lectures and other didactic teaching methods. Workshops on historical technique usually succeed best after a museum has already worked with a school or in response to a school-initiated request such as, for example, one to help develop an archaeology unit for the fourth grade.

Short workshops

Teacher in-service and similar workshops are infa-

mous because of the difficulty of doing them well. Usually short in length, they often, of necessity, take place in rooms ill-suited to teaching and involve large numbers of teachers, many times from different grade levels and disciplines. On the other hand, such workshops offer museum staff a wonderful opportunity to reach audiences that are otherwise difficult to reach. It is unrealistic to think that museums can turn on everyone in the workshop to the learning potential of museums, but even if the museum reaches only a handful of teachers, it has made important progress.

Three strategies help make the workshops successful. First, organize materials so that teachers work in small groups and can interact with one another. Second, provide plenty of opportunities for teachers to participate in short, snappy activities that have a clear application to the classroom. And third, link historical primary sources and inquiry techniques to the teachers' own experiences or to the communities in which they teach. Strategies involving role playing, problem solving, and the use of objects usually succeed.

Suppose, for example, that a school asks you to do a two-hour, after-school workshop on map skills – not the most scintillating topic for an afternoon in-service workshop. Rather than offering show-and-tell about historical cartography (even though it might be your favorite subject), try to find a way of drawing on people's personal experiences.

Begin the workshop by having the teachers draw maps of the neighborhoods in which they were children, including all of the natural and man-made features of importance to them. They will have a great deal of fun doing the activity. Using their maps, develop certain concepts with them such as central place, neighborhood, boundaries, and cardinal directions. After the map-drawing exercise, you might introduce a series of historical maps of the community and diaries that describe places depicted on the map. Then begin to explore what students can learn from the sources using techniques of historical inquiry. Even teachers of subjects other than history become engrossed, particularly with the historical maps of their own communities. Most teachers are genuinely surprised and pleased at what they have learned in a short time.

Intensive workshops

Some museums, in cooperation with college history and education departments and with other museums, have successfully offered intensive, week-long workshops for teachers. Longer workshops are ambitious undertakings because the logistics and personal interactions are more complicated. For several years Old Sturbridge Village has offered an intensive two- or three-week summer institute in which teachers learn the social history of the early nineteenth century and work with staff to design curriculum units that they then pilot with their students. They return to ten follow-up workshops during the school year for additional training in historical content and curriculum development.

This kind of workshop results in firm friendships among teachers and museum staff and in a high degree of commitment to field-based teaching techniques. Many of the teachers assist museum staff in offering workshops for other teachers in their schools and at professional conferences. When such workshops are done well, they are extremely effec-

OLD STURBRIDGE VILLAGE PHOTO BY ROBERT S. ARNOLD

Good museum-school collaboration brings museum staff and teachers together in an atmosphere of mutual respect.

tive and result in ongoing museum-school collaborations.

Recruiting teachers

Most museums have experienced the frustration of organizing and advertising a workshop only to attract a handful of teachers or none at all. Such an experience makes one cautious, somewhat fearful, and sometimes angry. But it takes time, patience, and personal contacts to gain the kind of access to teachers and administrators that you need in order to work with schools effectively. Most elementary principals are willing to talk with historical society representatives about possible programs, but they are cautious about committing their time and money. A principal is a "gatekeeper" of formal access to the school system. The principal can offer financial assistance through the budget process, recruit teachers to participate, advocate the project to the superintendent and school board, and provide program continuity when teachers leave or change grade levels.

A curriculum coordinator can also help you, but curriculum coordinators have different authority in different school systems. In smaller schools, an assistant superintendent may have responsibility for the curriculum and may have substantial power to influence principals, teachers, and the superintendent. In larger systems, the curriculum coordinator may have less authority and may have to persuade principals to participate in your program. You need the principal's support if a program is to be integrated into the school program.

Once you are ready to expand your program, you might conduct workshops at professional meetings of principals and offer to conduct programs as part of regularly scheduled teacher in-service programs. Principals are always looking for interesting presentations for their in-service programs.

At Old Sturbridge Village, we offer an annual administrators' day to which principals and their families are invited free of charge. Administrators' days are scheduled on Sunday afternoons. We send out invitations and request reservations. About 300 people attend. We give the families an information packet about our programs. They participate in hands-on activities, visit museum exhibits, and attend an informal reception. At the reception, we make a few points about the value of field study for students and invite the administrators to talk with us about workshops for teachers, field studies for their students, and curriculum materials for their classrooms. Over the course of several years, we have met hundreds of administrators we might not have met otherwise.

Museum educators should subscribe to the newsletter of the regional principals' associations just to monitor the locations of meetings, the discussion of issues, and new directions in curriculum development. You will find this general information invaluable when you talk to administrators.

Overcoming barriers to collaboration

It is very easy to become frustrated because teachers do not attend your workshops or take advantage of your education programs. The reason may be ignorance or laziness, but you should consider other possibilities.

While workshop publicity and a convenient, accessible time and place significantly affect teachers' decisions to attend a workshop, so do their attitudes. Unless teachers are predisposed to use museum resources and unless they are already interested in a problem that your museum program helps to solve, they will never even notice your program and workshop announcement. Teachers don't necessarily decide not to participate – they don't even consider it.

In many cases, past museum experiences haunt teachers. One teacher recalled: "I took my kids to that museum ten years ago, and staff was rude to the kids and to me. I'll never take my kids there again." The museum brochures he receives only remind him of his bad experience.

Many teachers feel that museums have more rules than collections and more interest in adults than in

OLD STURBRIDGE VILLAGE PHOTO BY DONALD EASTON

At the workshops, teachers transform historical resources into educational sources for classroom use.

kids. They feel that exhibits and programs are developed by curators and researchers who know their subject well, but who have little understanding of or interest in the way children learn. Teachers swap stories about museum programs to which they took their students because the topic was interesting and relevant to their curriculum, but which turned out to consist of boring lecture tours. Many teachers note that while museums say they are interested in collaborating with teachers, the staff rarely involves teachers in the planning. Jane Moriarty, a Scarsdale, New York, teacher says: "Many museum education staff members seem to come with their own agendas – ones that are inflexible to meet the needs of the teachers. I have found that when the museum education person . . . projects a friendly 'here's what I have to offer, how can I help you approach?' the teachers will respond positively."

Teachers explain that everyone has an agenda for them – they are under tremendous pressure to turn imperfect children into perfect students. One teacher said that elementary teachers have "twenty-five bosses, not including their principals. While we value museums, an all-day field trip to a historical organization is only 1/180 of a teacher's school year." Says Bob Fulton, a Mansfield, Connecticut, elementary teacher: "The number and variety of subjects to be covered, and the resulting preparation load can discourage teachers in a self-contained setting from looking for something new to try . . . . Many teachers view the opportunity to expand their knowledge as a challenge, but others see themselves already barely able to keep up with the demands of the existing curriculum."

Unfortunately, history and social studies are not high priorities in schools when the public worries about reading, math, and writing scores. National studies show that the amount of time spent teaching social studies in the elementary school has declined. These same studies show that teachers do not feel as qualified to teach social studies as they do other subjects. Students report that they do not like social studies very much and are often bored.

Many teachers find the skill-and-drill approach boring and respond appreciatively to interdisciplinary programs that address both skills and historical content. The staff at Old Sturbridge Village, recognizing that reading and writing have higher priority than social studies in the middle grades, developed a program called "Reading and Writing and History," which uses social studies content to teach skills. Teachers and administrators have responded well.

When a museum can engage a few teachers, the word begins to spread to others. Where once they might have swapped negative stories with their colleages, enthusiastic teachers now positively promote the museum.

Finally, teachers who had bad experiences can be pleasantly surprised if a new curator of education asks them to help advise the staff on the development of new and better education programs.

On the positive side, teachers report that good museum field trips and the accompanying classroom activities are among the most popular and memorable experiences for both teachers and kids. Parents help raise funds for such trips, and they quickly

become a tradition in the school. One teacher asked her eleventh-graders to bring in the materials they had used in their Old Sturbridge Village fifth-grade unit. Even she was surprised when nearly every student brought in the materials.

Most teachers visit a museum no more than once a year. Thus, the museum must think in terms of annual or semiannual cycles. Think, too, about the significance of reaching only a few teachers in the first attempt. One teacher can open up avenues to other teachers – to teachers in the same schools, to friends in other schools, to an administrator, to other teachers in professional organizations, and to funding agencies. One teacher worked with OSV staff to develop a curriculum unit, set up an in-service workshop at her school, presented a workshop with OSV staff at the regional social studies conference for about fifty teachers, and linked OSV staff to the parochial diocesan office, thus leading to a professional day workshop for twenty teachers. Here are some helpful hints in reaching teachers:

•Contact teachers who already bring students to your institution or whose schools use your programs. Ask each teacher to give you the names of two to five teachers who might be interested in being on your mailing list.

•Contact your state department of education. At the very least, the department has mailing lists and perhaps a newsletter that can help you reach principals and teachers. The department of education sets curriculum requirements and may have a social studies unit that will help you organize workshops. If so, the department staff members are probably active in social studies professional organizations and in curriculum development. Ask for their help in offering workshops and for their support in submitting grant proposals.

•Join local and regional professional teacher groups (National Council for the Social Studies, Reading Teachers Association, Association for Supervision and Curriculum Development, your state association of independent schools, and others). Most teachers in the middle grades join their state teachers' organization and sometimes the state reading teachers' association. Once you join an organization, work on its committees and offer your site facilities for tours, meetings, and workshops. Such groups welcome well-organized people, whether teachers or museum educators, who are willing to work, and in such groups you will meet the more committed teachers.

•Offer workshops at teachers' professional meetings. Make sure your programs have snappy titles keyed to the interest of teachers and the needs of students. Design them to include hands-on activities and resources that teachers can use in their classes. Employ role-playing and other techniques that are both fun and practical. When teachers attend professional meetings, they search for ideas they can use immediately back at school. Offer them high-quality hand-out material – teachers live on hand-outs – and they will be reminded of your museum every time they photocopy them.

•Coauthor with a teacher articles for professional journals such as *Educational Leadership, Social Education, The History Teacher,* and *Learning Magazine.* Do a quick survey of the teachers you serve to find out what educational periodicals they read.

•Write a grant proposal to develop a new project and include in the budget funds to pay stipends to teachers and to cover teacher-release time.

•Hold an open house for teachers and their families on a weekend. Offer many of the activities you regularly offer schools. Plan the day to be fun and interesting.

•Join other museums in your area to offer a multidisciplinary program for teachers, either as part of an existing social studies conference or as a separate conference itself. For the conference, secure endorsements from local school systems, professional teacher oganizations, and other groups serving teachers. Combine short workshop sessions with an exhibit area featuring the resources and programs your museums have to offer them.

•Ask teachers you have identified as self-starters to join an advisory board or a project development team. Provide a few inexpensive benefits for those teachers who get involved with the museum or who help you conduct workshops – free museum membership and materials, special programs for their students, new classroom materials or teaching activities.

•Consider purchasing a mailing list from a list broker in order to advertise your regular museum programs and your special workshops. Such companies provide mailing labels that contain the names and addresses of teachers. They often organize the lists by grade level, subject specialty, and zip code. You can develop you own list of principals and schools by using your state's department of education directory, but mailings to principals tend to end up in wastebaskets. Mailings to individual teachers usually land on the teachers' desks. Word-of-mouth, however, remains the most effective form of advertising.

•Think carefully about the workshop dates before you advertise the programs. Stay away from major school vacations, the end of grading periods, and the end of the school year. Teachers say that after mid-May they find it difficult to attend any workshops. Schools that provide release time prefer weekdays, but teachers will attend a Saturday workshop they think especially relevant to their needs.

•Produce attractive promotional materials and announcements to help convince teachers a workshop is worth their while. Consider, too, other promotional strategies: ask professors of education at nearby colleges to distribute fliers to their students and post announcements on bulletin boards; send a description of the workshop to the newsletter of the state department of education and the state council for the social studies, as well as other relevant periodicals; encourage teachers you know to pass out fliers and to spread the word. And, most importantly, send an announcement – or better yet, a short article – to your local newspapers. Prepare a press release and send it to the education reporter. Follow-up with a telephone call.

Financial matters

Should you charge a fee for your teacher workshops? Won't a fee discourage teachers from coming at all? You must consider such questions. Unless a museum is willing to commit itself financially to the workshop and allow staff to spend the time necessary to collaborate with teachers on program development, the staff can't do the workshop well. On the other hand, money the museum spends for education program development may come only at the expense or delay of other museum activities.

Clearly, when a museum asks teachers and schools to collaborate on a program, it can hardly expect them to pay a workshop fee. Indeed, since teachers function as consultants on their own time (unless the school agrees to release them and to pay their substitutes), you should offer either a stipend to the teachers or at least some other benefit such as membership, free admission for students during the piloting of the program, and free program materials.

Many museums seek outside funding for project development and the accompanying workshops. In some states, the state department of education or the state council on the arts and humanities funds projects designed to promote collaboration between museums and schools. Others provide grants for teacher training. Individual school districts sometimes have in-service training budgets to release teachers to attend workshops. Usually such grants require some cost sharing by the museums and the schools. Grant funds often cover cash expenses not already budgeted, such as teacher stipends, printing, transportation expenses, and some museum staff time. In-kind cost sharing often includes salaries of the museum staff, indirect costs of operating the museum, and salaries for substitute teachers who take over classes while others attend your workshop.

Grant-supported projects, though, often mask the

long-term expenses of operating the program and of offering teacher workshops. The museum staff and school administration should make tentative budget projections to avoid developing a program on grant support that neither can afford when the grant ends. Many museums have developed high-quality, grant-funded programs that could not be sustained. In general, it is better to let programs grow gradually, creating a sense of positive momentum.

After a museum establishes its programs and develops a good reputation, it should charge workshop fees to cover costs of workshops, either through direct fees or through contracts with schools or other funding agencies. The fees can range from $5 to $35 or more for a six-hour workshop, depending upon whether the workshop fee includes lunch and materials, whether a well-known speaker has been engaged for the day, and other features. Schools customarily pay for services; if museums do not charge what their programs cost, they will not be able to sustain them.

Many museums find that offering credit to teachers for workshops entices them to attend. The credit can be formal graduate credit, offered through a cooperating college or university, or it can be in-service credit granted by the teachers' school system. In either case, you must first negotiate with the credit-giving organization to define contact hours, demonstrated work (papers, curricula), grading, and other issues.

Conclusion

Frequently, various commission reports urge reforms in education and create opportunities for museum-school programming. The reports and the state requirements that sometimes follow build a museum's audience for teacher workshops. Museums that anticipate the needs of teachers, students, and principals and that have developed appropriate programs have a unique opportunity to forge long-lasting relationships with teachers and school systems.

We cannot assume that teachers and principals will come knocking on our doors; they are simply too busy to develop programs in unfamiliar fields. We cannot assume that teachers will remember our programs from year to year or that teachers will convert to museum-based teaching approaches by participating in a single workshop or program. Instead, we must be willing to do more than what we perceive to be our share to initiate and to maintain collaborations. We will need to write the grants, work with teachers to develop easy-to-use, challenging curricula and instructional materials, and promote our programs effectively. We will need to develop expertise in the world of the schools as well as in our own historical content. But if we design teacher workshops that link historical societies and school systems, our educational programs will be long lasting and effective in communicating the spirit of museums to generations of learners.

Acknowledgments

I am very grateful to many colleagues who reviewed this essay in an early draft. Warren Leon, my colleague at Old Sturbridge Village, was especially helpful in suggesting changes in substance and style, as were Cindy Robinson of the Worcester Historical Museum and George McDaniel of the Atlanta Historical Society. Thanks also go to John Gannon, the principal interviewed for the report, and to several teachers, especially Jane Moriarty, Bob Fulton, Gerry Barbeau, and Marion Thorstensen, who contributed their thoughts. Other colleagues who reviewed the manuscript and made suggestions included Mary Alexander of Mount Vernon; Jim Wallace of the Kentucky Historical Society; Sara Patton, Kelly Nolte and Nancy Perry of the Jamestown, Virginia Festival Park; A. T. Stephens of the Fairfax County Park Authority; Ruth Schwendeman of Old Sturbridge Village; Angelia Gacesa of the Country Music Hall of Fame; and Marie Hewett of the Margaret Woodbury Strong Museum. And finally, I wish to thank the National Endowment for the Humanities, which has supported many teacher workshops at Old Sturbridge Village.

A Teacher Workshop Checklist

Preparation

- ☐ objectives defined
- ☐ materials developed and organized, including handouts
- ☐ activities well thought out and appropriate to objectives
- ☐ sequence and timetable established
- ☐ staff roles clear
- ☐ interesting title; wording conveys interest and activities as perceived by teachers

Publicity

- ☐ audience targeted and mail lists assembled
- ☐ mailings and press releases issued in time to allow response
- ☐ plan developed to take advantage of announcements in journals and newsletters or included in mailings of cooperating teacher organizations
- ☐ fliers colorful and have eye-catching visuals and design

Logistics

- ☐ workshop confirmations sent to registrants
- ☐ directions to the museum provided
- ☐ clear directions to the workshop space included
- ☐ security and other museum personnel notified
- ☐ coffee, tea, decaffinated beverage, and refreshments available
- ☐ setting attractive, comfortable, and clean
- ☐ typed agenda prepared
- ☐ name tags typed
- ☐ markers, paper, and other instructional materials available
- ☐ bathrooms nearby and identified
- ☐ distractions minimized (private room, adequate ventilation and heat, and similar comforts)

Workshop Activities

- ☐ overview of the day and clearly stated objectives
- ☐ informal atmosphere
- ☐ balance of information giving (lecture and reading), hands-on activity, and discussion
- ☐ workshop organized around an outline of questions that build from factual knowledge to historical generalization using problem-solving techniques
- ☐ breaks built in (sessions about forty-five minutes to one hour in length)
- ☐ teaching sequence logical and builds on previous activities
- ☐ sense of closure at the end of the day

An Interview with a Principal

Q. *When you receive an inquiry from a museum or historical society about sending a teacher to a workshop, what do you consider?*

Principal: I first consider whether the topic of the workshop deals with an important aspect of our curriculum or helps us provide a better experience for kids than we can provide in the classroom. I also want to know something about the organization offering the program. I want to be sure that the staff there is sympathetic to the needs of the teachers and the students and is able to work with the teachers to develop a good program for the students.

Q. *What are some of the problems you anticipate in working with historical organizations?*

Principal: Many times the historical group will develop a program and perhaps get a small grant to support a teacher workshop before contacting the principal or teachers to help shape the project. The program may not be appropriate to the curriculum of the school or it may demand more time of the staff than we have to give. Another problem is that the staff members of the historical agency are sometimes unqualified to develop materials and teaching strategies that will work with students. A third problem is that the objectives of the historical organization may be unclear. The director may want the kids to visit so the museum will look good, but may not want to devote many resources to the project. The curator of education may be passionately interested in the project but doesn't have the resources to really follow through over the long run. In such a case, even if a collaboration is begun, it will be short lived; successful partnerships require clear goals and firm commitments over two or three years at least.

Q. *Why is it important for the museum to involve principals when they are initiating a teacher training program?*

Principal: A principal's job is to make judgments about the potential of a teacher workshop to contribute to the education of the students in the school. Often the principal must sell the idea of participating in the workshop (and thereby getting involved in a project) to a teacher, to the school board or committee and perhaps to parents, especially if fund raising is involved. Unless the principal knows what the project involves and why it is important, the principal will be a poor advocate. If I am involved, even if only at an orientation level, I can choose a teacher who I think will have the best chance of making a new project a success.

Q. *When a teacher participates in a teacher workshop at a historical museum, what role should the principal play in relationship to the teacher?*

Principal: Ideally, the museum will invite me to an orientation workshop to explain what the program is all about, to involve me a little in the materials and activities they intend to use with the teachers and to answer my questions. This process can also be accomplished by having someone come to my school to talk with me. I like to have some input into the program "menu." I can then talk with teachers about the project/workshop before they go to it.

When the teachers complete the training, I try to initiate a follow-up meeting to discuss what the outcomes of the training are and how they will affect the way we teach the students. I try to be encouraging and supportive, but also try to get the teachers to be specific about what will be implemented and to clarify areas of confusion. Sometimes the teachers and museum staff develop a program that does not

belong in the curriculum of a particular grade. Unless we catch this problem early, it can become terribly awkward and disruptive to the school. Also, my role is to provide budgetary support within the usual severe limits, to facilitate the logistics if field study is involved and to keep the superintendent and school committee and parents informed. I often make sure there is publicity for the project during implementation.

In the event that there is a problem between the school and the historical organization with which we are working, I try to resolve the problem in a positive way for both partners. At some point, when the project has been implemented, I sit with my teachers to discuss revisions and incorporation into the school curriculum and school calendar.

The principal's role can be well illustrated by considering what happens to a museum-school partnership if a teacher transfers to a new grade level or leaves teaching completely. The principal provides the continuity to maintain the institutional commitment to the project. Similarly, if the principal leaves, then the ongoing support of the teachers is highly important to convince the new principal of the worth of the program.

Q. *Many museum people say that they cannot get teachers or principals to even think about coming to a workshop. Do you have some suggestions of effective strategies to get the ear of principals?*

Principal: It is fair to say at the outset that there are some principals who will be extremely hard to reach either because they do not see museum programs and resources as being affordable, easily implemented or workable for children within the severe budget and time constraints operating on the schools. Such principals will be reached best by an enthusiastic self starting teacher armed with a dynamite program developed by the museum, preferably subsidized by a grant.

But other strategies are useful too. Most principals will be willing to talk with the museum educator if the educator can come to school. If the museum can offer something that addresses a school priority in a significant way and is willing to do more than its share in the partnership initially, at least, principals listen. Thus a program that is designed to improve student thinking, reading, or writing skills will receive more of a response than a program described as simply a local history program.

A good presentation by museum staff at an annual principals' meeting may catch administrators with their minds open to new ideas and resources. An open house at the museum for administrators and their families featuring your programs for students can meet a personal need for family leisure while also selling your museum to the principal.

Selected Readings

Beall, Pamela, et. al. "Students and Family History: The View from Old Sturbridge Village," *Journal of Family History*, Spring, 1981.

Fraenkel, Jack R. *Helping Students Think and Value: Strategies for Teaching Social Studies.* Englewood Cliffs, N.J.: Prentice Hall, Inc., 1973.

Furth, Hans G. *Piaget for Teachers.* Englewood Cliffs, N.J.: Prentice Hall, Inc., 1970.

Kolb, David. *Experiential Learning: Experience as the Source of Learning and Development.* Englewood Cliffs, N.J.: Prentice Hall, Inc., 1984.

O'Connell, Peter S. "Adolescence and Museums." Unpublished report of the high school outreach project at Old Sturbridge Village, 1981.

Rogers, Everett M., and Shoemaker, F. Floyd. *Communication of Innovations.* New York: Free Press, 1971.

Sebolt, Alberta P. "The Teacher Training Program at Old Sturbridge Village," in *Museums, Adults, and the Humanities.* Washington, D.C.: American Association of Museums, 1981.

Taba, Hilda. *Curriculum Development, Theory, and Practice.* New York: Harcourt, Brace, and Jovanovich, 1962.

Technical Reports are issued by the American Association for State and Local History. The reports provide the historical agency and museum field with detailed, up-to-date technical advice. All members of AASLH receive copies of technical reports as they are issued.

American Association for State and Local History, Technical Report 12, HISTORY NEWS, Volume 42, No. 3, May-June 1987. *How to Develop Effective Teacher Workshops.*

For information about Technical Reports 1-11, write the American Association for State and Local History, 172 Second Avenue North, Suite 102, Nashville, Tennessee 37201.

How To Make Local History More Accessible

Educational Outreach Packets

BY SONIA L. GAHLHOFF
AND KATHLEEN A. HENWOOD

"I just can't find good materials on local history to use in my classroom, and I don't have time to search for materials to adapt for my class."

"It's just not convenient to organize our group to go all they way to the museum."

"The historical society's exhibits are always changing. And it never has enough exhibits about pioneers!"

Do any of these comments sound familiar to you?

Until recently, the Education Department of the Museum of History and Industry in Seattle heard these comments all too often. Through outreach materials, though, we have helped people who are interested in local history find reliable resources on the subject. We have made the information found in our collections more accessible to all ages, in a format that can be readily presented to community and school groups. Now we are also serving a large segment of our community that is unable to visit our museum.

The Museum of History and Industry is under the administration of the Historical Society of Seattle and King County. Although the museum is not large, it has an extensive collection of resources on the history of Seattle and the Pacific Northwest: a library, artifacts, photographs, and a professional staff. Like most history museums, it has a collection of diverse artifacts that it exhibits and interprets regularly.

COURTESY OF THE MUSEUM OF HISTORY AND INDUSTRY

Kathleen A. Henwood and Sonia L. Gahlhoff, education specialists at the Museum of History and Industry in Seattle, sort through the various materials they developed for a series of educational outreach packets. Among the many primary sources they used were the museum's photographic collections, including the print of a dramatic representation of the official Alaska-Yukon-Pacific Exposition emblem, opposite page.

The museum's staff is skilled in researching objects and translating that information into exhibit labels. By taking the interpretation process one step farther, we based our outreach materials on the same information but packaged and directed it toward a specific audience. Exhibits, special events, seasonal attractions, a staff member's area of expertise, and strong areas of the collection are all possible focuses for outreach programs that require little further research. The information must be merely translated into a more accessible and permanent format.

Our resource packets not only teach the facts and their significance, but also introduce the community to historical research methods. By encouraging the audience to discover historians' tools, such as photographs and other primary documents, we hope to teach people how to apply these methods to historical objects they encounter on their own. Our educational resource packets address questions such as "Why?" "What was it like when. . . ?" and "So what?" They include slides, classroom activities, reproductions of photographs, maps, and more.

Packaging history

As interns under the direction of James

Sonia L. Gahlhoff and Kathleen A. Henwood are education specialists and former interns in the education department of the Museum of History and Industry in Seattle, Washington.


SEATTLE 1909

Reiss, curator of education, we tackled the problem of responding to requests from teachers for curriculum materials. First, we conducted a survey of teachers. The results pinpointed some common needs: third- through eighth-grade teachers were most interested in outreach materials on topics dealing with local history and requested activities and games. All teachers preferred information in a packaged form, ready-to-implement in the classroom, and appreciated the ability to buy or borrow the materials. The teachers wanted accurate documentation and colorful visuals to spark the children's curiosity. On the basis of this information, we determined topics and a format for these materials.

Although video tapes, traveling boxes of artifacts, filmstrips, and curriculum-based lesson plans are all possible formats for outreach materials, we chose slide packets as the format for our materials. This format allows us to use the museum's extensive photograph collections. The slides project images of artifacts, portraits, and historic events or street scenes, while the accompanying script focuses on what happened and *why*, the implications for the people of that period, and the contemporary implications. The slide format allows teachers and other users to add or delete information to make the program appropriate for different audiences. Additionally, slides are easy to present, and most groups have access to slide projectors. Slides can be reproduced quickly, packaged in sleeves, and mailed inexpensively.

Once we determined a format for our outreach materials, we chose themes to explore through these slide packets. One was the Great Seattle Fire of 1889, a key event in the city's history. Instead of concentrating on the actual event and the damage it caused, we focused on the fire's significance to the growth and development of Seattle. We drew much of our research from primary documentation contained in the museum's exhibit on the Great Seattle Fire. We found other primary resources in various university and government archives, libraries, and private collections.

In this packet, we included slides depicting Seattle before, during, and after the fire. The script identifies and dates each image and then encourages the audience to go beyond the facts. In some segments of the script, for example, we ask the audience to consider how the people in the photograph might feel, or why these people made the decisions they did. Thus, students are provided both with cognitive information and with an opportunity to think creatively and to draw their own conclusions.

In addition to "The Great Seattle Fire of 1889," our series of slide packets deals with other aspects of Seattle's history. We have found that topics dealing with local history stimulate community interest and satisfy the needs of teachers. Programs on local history, rather than on American history, more effectively carry out the museum's central purpose: to interpret the history of Seattle and the surrounding area.

Although directed toward a younger audience, the scripts for these slide programs can be adapted for older audiences. Adult audiences have found that these programs stimulate and clarify memories.

In each program, the accompanying written material emphasizes exploring and discovering history-related concepts. By employing the method for studying material culture described by Edith Mayo in "Introduction—Focus on Material Culture" (*Journal of American Culture* 3 [Winter 1980]), we created slide resource packets that explore "not only surface

The Great Seattle Fire of 1889 was one topic for which Seattle schoolteachers needed curriculum materials. The outreach packets developed by the Museum of History and Industry included this photograph of Front Street from the George Francis Fay collection.

data (identification, description, authentication) but interior qualities (evaluation, interpretation, significance)." Thus, these materials, "can stimulate new modes of perceiving the past and understanding the present."

In our initial survey, teachers requested games and activities dealing with local history. We, therefore, included, along with vocabulary and reading lists, "extra resources": period activities, songs, recipes, newspaper articles, letters, period advertisements, crossword puzzles, timelines, maps, and charts. We located most of these resources in the course of our research. We created others from information and materials drawn from primary resources, such as historic magazines for children. Teachers incorporate these resources into their lesson plans according to their teaching styles and use them to reinforce the concepts stressed in the script.

To compile slides, script, and resources into a packet, we labeled the slides and put them into sleeves in the correct order, so that they could easily be loaded into a carousel. We created booklets for each program containing the script, the vocabulary list, handouts, and activities. A graphic artist designed a cover for each booklet. Finally, we placed the slides and booklet into a 10 by 13-inch envelope for mailing. We included an evaluation form to find out which teachers used the packets, how they were being used, as well as which elements of the packet were most successful. We plan to revise the packets as necessary.

In an effort to promote these materials, the museum mailed a professionally designed flier and held an open house so that teachers could review the outreach materials. To cover costs, we decided to sell the packets for $30 each and to loan them for a period of two weeks at a cost of $15 each. The flier and each slide packet contain an order form listing the entire series and the prices.

By using skills and resources already available, any museum can develop a body of outreach materials that become a permanent public resource. By disseminating local history information that is

COURTESY OF THE MUSEUM OF HISTORY AND INDUSTRY

Developing Outreach Materials

- *Meet the needs of your audience.*
  - Target your audience
  - Survey the needs of your targeted audience
  - Determine how to meet those needs by formulating clear learning objectives and selecting your topics
- *Research your topic.*
  - Consult primary sources
  - Consult other community resources and organizations
- *Write your script.*
  - Outline the script
  - Choose visuals that illustrate the script and promote your learning objectives
- *Develop support materials.*
  - Compose a vocabulary list of key concepts
  - Compile a reading list
  - Include community resources
  - Produce the audio tape
- *Package your product.*
  - Package the slides
  - Organize the script and activities into booklet form
  - Develop an order form
  - Create an evaluation form
  - Design graphics for booklet covers and handouts
- *Determine how to market and distribute your product.*

researched and presented well, the museum continually reinforces its central role as a caretaker and interpreter of history. Museums already interpret historical information in galleries and exhibit catalogues to the general public, but outreach materials can effectively reach a specific audience.

Developing a collection of accurate, educationally sound outreach materials has enabled the Museum of History and Industry to respond to the community's request for information, classroom materials, and ready-to-implement presentations on local history. The packets serve as effective teaching materials because they focus on concepts that are significant to the community's development in the past, as well as today.

By capitalizing on its artifacts in a series of outreach materials, any museum can use its collection as a catalyst to further exploration of history. Outreach materials serve as examples of the kinds of thought-provoking and visually exciting materials available within the museum's walls. Outreach materials communicate with the community in a way that will raise the public profile of the museum. **HN**

IN MY OPINION

Selling Your Good Name

BY STEVEN MILLER

Are you considering an antiques show to raise money for your organization? You ought to think again. Quite possibly you may do more harm than good by linking your organization's name to the commercial antiques business. You will momentarily take part in the destruction of artifacts, confuse public perceptions of your function, and emphasize values at odds with those you normally espouse.

While reading a recent issue of a newspaper devoted to the antiquities trade, I was struck by the inordinate number of advertisements for "antique shows" being sponsored by museums and historical societies. The center section alone contained a fourteen-page promotional insert about an extravaganza being held to benefit a historical society in western Massachusetts. I was perplexed that organizations striving to preserve our material past would be so closely associated with its scattering.

The antiques business does not pursue the kind of preservation goals so important to museums. Indeed, in the market-

THE ANTIQUES BUSINESS does not pursue the kind of preservation goals so important to museums.

place art and artifacts often lose their identities as a dealer's inventory experiences physical change and intellectual abuse. Even the most respectable dealers will, for obvious reasons, be selective in the documentary information they provide or spurn proper conservation work for a quick fix.

A simple exercise proves my point. Walk into any antique store and ask about an item in stock. Try to find out where it came from, who owned it, how it was

Steven Miller

used, and what history of its condition exists. Chances are you won't learn much. This dearth of information may not be the dealer's fault. Antiques can pass through many hands and lose their roots along the way. But dealers must know *something* about where an item came from. Some may tell you; others won't, since the information may affect the price tag and the prospect of a sale or divulge a source of goods.

Many antique dealers alter or repair the artifacts they sell. Such actions may be devastating. Paintings are poorly "restored," pieces of furniture get refinished or otherwise altered, prints are removed from books and colored by hand. Another exercise, a slight variation of the one outlined above, demonstrates the problem. When visiting an antique shop, select an item and ask if work has been done to it recently. If the answer is yes, ask to see a written report of what was done, when, how, and by whom. The chances are slim that you will get such a document. If you do, show it to a reputable conservator whose opinion you trust. The reaction will be illuminating.

Writers on museum ethics regularly point out the problems that can result when museum staff members personally engage in buying and selling antiques. Yet museums themselves are rarely held to account for their involvement, direct or indirect, in such activities. (The exception is deaccessioning, the implications of which are being hotly debated.) This is unfortunate, for how museums act in the commercial marketplace certainly affects their reputations as preservers of the public patrimony. Already, adverse results can be measured. Fifteen years ago I never heard potential donors to museum collections express concern about the possible later disposal of what they were giving. Donors could assume that once an item entered a museum it was there for eternity. Fifteen years ago art and antique dealers may have jokingly suggested trading inventories with museums; today we know this happens.

HOW MUSEUMS ACT in the commercial marketplace certainly affects their reputations as preservers of the public patrimony.

The public gets mixed messages when museums engage in antique shows. Do museums save or sell? To explain why we seek items from the past and then to countenance the dispersal of such items sends confusing signals to our publics. Collections theoretically have no financial value (except for insurance purposes). Each item is preserved for inherent informational or aesthetic properties. When

TO EXPLAIN WHY we seek items from the past and then to countenance the dispersal of such items sends confusing signals to our publics.

museums collaborate with the commercial antique business, they contradict their own missions and reinforce peoples' belief that old things are worth money and *that* is their ultimate importance.

Those of us in museum work would be naive if we thought that all who pass through our exhibit halls saw collections simply as a source of knowledge about the world or an assemblage of some of its beauty. Eavesdrop on your visitors' conversation, and you will sometimes hear comments on what this or that artifact

Steven Miller is the assistant director of the Maine State Museum in Augusta.

must cost. That's understandable. After all, museums and historical societies save things deemed to be precious, and preciousness in our culture is equated with monetary value.

But we explicitly encourage people to consider the monetary worth of our collections when we deaccession by selling, offer old items for sale in our gift shops, or sponsor antique shows. We do it when we promote exhibitions by putting words like "treasures" or "masterpieces" or "gold" in their titles. And we put dollar signs in peoples' minds when we spend lots of money on an acquisition, make this known to the press, and display the item with great fanfare.

WHEN A MUSEUM OR historical society sponsors an antique show, among the goods sold is the organization's imprimatur.

When people mention that they bought an item at our museum without specifying that it came from our museum's antique show, what will be the listener's impression of how our institution cares for its collections? While we in the profession may differentiate between artifacts on the commercial market and the artifacts we preserve, the public does not.

I once grumbled to Don Friary, director of Historic Deerfield, about this subject. He responded cleverly, "But we're all in the antiques business!" He's right. A problem arises when the "antiques business" of museums emphasizes buying and selling rather than preserving and interpreting.

Museums need money, but sponsoring an antique show may not be the best way to realize income. When a museum or historical society sponsors an antique show, among the goods sold is the organization's imprimatur. In aping the commercial sector, we abet poor preservation practices and assist in destroying material culture. How can we in the profession advocate the preservation of our material heritage while sponsoring its dispersal when we need money? People are not dumb. We can't engage in contradictory behavior for long without being taken to task. HN

FOR THE BOARD

Ethics and the Historical Organization

BY GORDON O. HENDRICKSON

The historic site you run desperately needs a van. A local used car dealer offers one free if you will provide a receipt for a charitable donation twice its real value? Do you accept the offer?

Each of us knows right from wrong. We acknowledge that it's wrong to steal from a neighbor. That view is prompted not only by our desire to avoid imprisonment but also by our belief that personal property *is* personal and that it is not right to relieve another person of property against his or her will. We condemn a legislator who accepts cash in return for a vote on a particular issue. Our ethical position in this case is based on the idea that political leaders are elected to serve for the benefit of their constituents, not to line their own pockets.

These two examples present some straight-forward ethical issues. But what about the offer from the car dealer? Or our personal acquisition of items deaccessioned from our museum? Or conflicts of interest?

If we check the dictionary, we find two useful definitions for ethics: "the study of standards of conduct and moral judgment," and "the system or code of morals of a particular philosopher, religion, group, profession, etc." Clearly we are talking about a value system that delineates between what is good and what is bad. In the words of one authority, "Ethics directly asks what kinds of acts are right or wrong, good or bad, or ought or ought not to be done." These ethics may be individualized or codified.

Our individual code of ethics affects the way we respond to such questions as the offer of a van for our museum. We bring our own personal views to every decision we make, views based on our individual philosophical, religious, and moral background. Even though there may be some common ground of societal understanding of right and wrong, considerable latitude for individual interpretation and implementation remains.

Our problem is not, then, to create an ethical environment within which our historical agencies can operate, but to understand the environment that already exists. Many forces come together to help create the ethical environment of our agency. If we have trustees or employees who do not believe in the use of alcohol for nonmedicinal purposes, their views become part of our ethical environment. Consideration of their opinions will enter into the discussion of whether or not to hold a wine-tasting party as a fund-raiser. A board member's ethical view on human rights issues may influence a decision to invest the agency's endowment in companies doing business in South Africa. That decision may also be influenced by the image our agency wants to present to the public and by our constituents' views on the issue.

Many of the specialized groups within our profession have adopted codes of ethics to establish some guidelines and frameworks for the profession. These codes are general in nature and usually set forth simple standards of professional conduct. They do not pretend to define ethics or to justify professional standards with moral statements.

The real question we face is whether a historical agency has, can have, or even should have a corporate ethic. If it should, how is one developed that takes into consideration the many factors facing the agency: the ethical values of its constituent groups, the views of staff members and trustees, and the standards of professional groups represented in the organization?

Douglas Sherwin argued in the November-December 1983 issue of the *Harvard Business Review* that corporations may have corporate ethics, but those should not go contrary to the basic justifications for business in our economy. He maintains that each company (he was speaking of for-profit businesses but this also applies to not-for-profit agencies) has to understand the basic justifications for its existence to develop a corporate ethic that does not violate those basic precepts.

A public trust

What is it that society expects from the historical agency field? It seems to me that an essential component of our existence is that we are trustees for the public in specific endeavors. Some of us hold artifacts or manuscripts in trust for the public. Others have a responsibility for presenting educational programs. Still others have a public responsibility to work to preserve our built environment. Because of our not-for-profit incorporation and our tax-exempt status, we have accepted responsibility to maintain our resources for the public good. We are obligated to create a corporate ethic that is based on doing the right thing for the public.

Public policy often imposes certain ethical obligations on us. Acceptance of federal grant money means that we are legally forbidden to discriminate against an employee or applicant on the basis of race, color, creed, or sex. Donors, as well, may attach conditions to their gifts. We have to evaluate those conditions carefully—no small ethical problem itself—and then observe them afterwards if we accept the donation.

The members of the board of trustees, as the ultimate governing body of an agency, bring their personal ethics into play as they make decisions and set policies for the historical agency. The manner in which they conduct their personal and business affairs will naturally be reflected in the way they conduct the affairs of the historical agency. Likewise, the director of the agency brings a personal set of moral convictions to bear on the agency.

Codes of ethics for a particular profession also provide guidance on the propriety of some actions. The code for directors of art museums gives guidelines for resolving potential conflicts between the director's own collecting interests and those of the museum. The code of ethics for curators provides guidance on accepting gifts, favors, discounts, and dispensations. The professional cannot, however, assume that the profession's code of ethics will apply in all cases. The American Association of Museums suggests in *Museum Ethics* that "the acquiring, collecting, and owning of objects is not in itself unethical, and can enhance professional knowledge and judgment." That statement is reasonable, but not every museum will allow its employees to collect in fields of interest to the museum.

How, then, do we balance the different and potentially conflicting ethical positions facing the agency and make the "corporate ethic" known to employees?

Individuals working in a historical agency may be aware of the position of

Gordon O. Hendrickson is associate director of the Western Historical Manuscript Collection and the State Historical Society of Missouri Manuscripts in Kansas City. This article is adapted from a speech he delivered at the 1986 AASLH annual meeting in Oakland, California.

their professional organization on particular ethical conflicts, and they have their own sense of right conduct. But they may not know the position of the agency. Without a clear statement of an agency's ethical perspective and expectations regarding actions of employees, staff members have to rely on their personal perspectives and what they can deduce of the agency's position. But what happens when the employees feel a conflict between their personal ethics and the perceived ethics of the agency? How are they to react in a situation when there seems to be a difference between what they would do if they were operating totally on their own and what they would do if they were to follow what they perceive to be the ethical policy of the agency? How are employees to know if their apparent understanding of the agency's position is correct?

Spelling it out

For just such instances, an institution needs a code of ethics. A code guides employees through the agency's policies in situations where ethical questions arise. Codes of ethics pointedly discuss such matters as conflicts of interest and declarations of potential conflicts, the agency's policy on gifts from venders and suppliers, personal collecting by curators, and the proper relationships with competing institutions in the community.

One of the problems with codes of ethics is their general nature. While providing some guidance, they frequently fail to resolve knotty questions where the facts are ambiguous, where temperaments and personalities collide, or where there is no clearly right or clearly wrong course of action.

But even though codes have this inherent problem, every historical agency should have one, in writing. With written guidelines available, employees need not rely only on their individual philosophies to resolve ethical issues. Nor will they have to try to intuit the agency's position.

Equal in importance to the written code of ethics are the unwritten statements by the agency's leadership. L. W. Fox, former chair of the board of Bethlehem Steel, observes that the "primary responsibility of business management [is] to instruct, motivate, and inspire employees to conduct themselves with honesty, probity, and fairness. Starting at the top, management has to set an example for others to follow."

A basic task of historical agency leaders is to attract good trustees who will set examples for employees. Orientation of trustees should include a session on ethics and the trustee's role in setting an example for everyone at the agency.

As with the board, so with the staff. Each employee at the time of hiring and at intervals thereafter should receive training in the agency's written code of ethics and the expectations that follow from it.

Developing the written code of ethics is a crucial activity of the board of trustees. The provisions of that code will take into account the agency's fundamental purpose—doing the right thing for the public—the values of the trustees, director, and staff of the institution, and the established codes of the specialized professions represented on the organization's staff. The finished code becomes a guide for resolving ethical problems as they arise, but will not establish absolute rules nor try to anticipate every case. The example of the agency's leaders, together with the code of ethics, provide the framework within which employees answer the questions that arise daily in their work. HN

THE BOOKSHELF

Financial Analysis for Museum Stores
Thomas H. Aageson
Museum Store Association (61 South Pine Street, Doylestown, Pennsylvania 18901), 1986
50 pages, $15 MSA members, $20 nonmembers; plus $1 postage and handling

REVIEW BY MARY MILEY THEOBALD

Thomas H. Aageson of Mystic Seaport Museum Stores states that the purpose of this booklet is "to acquaint managers and others with the analytical tools necessary for good management," thus giving museum store managers and their superiors "benchmarks by which future shop performance can be measured."

The study is the result of a detailed analysis of the statistics compiled on nearly two hundred museum stores from 1980 to 1984. For the first time, museum store managers have an opportunity to make comparisons between their own figures and those of other similar establishments and to track progress in their own shops from one year to the next. The results of such comparisons are useful in pinpointing both problems and successes, and in helping the store manager to spot trends, evaluate changes, test experiments, prepare and follow a budget—in short, to understand the business better.

In the introduction, Aageson focuses on the unusual dilemma facing museum store managers, those "resident capitalists in a nonprofit environment." Working under conditions and premises foreign to for-profit gift shops, museum store managers are expected to make similar profits while avoiding excess "commercialism." He points out that the array of merchandise found in most museum stores is typical of large department stores where there are specialized buyers to tend to each line. But the small size of a museum store prohibits such specialization, so the manager must not only manage the store but also master the complexities of a diverse product group, from jewelry to toys, from books to clothing.

Museum store managers must deal with the concept of product relatedness, for both ethical reasons and IRS concerns. And the museum store manager is often required to develop products, something almost unheard of in the "real world" of for-profit retailing.

Another area of extra responsibility could have been mentioned here: the educational aspects of a museum store. What sets them apart from their for-profit neighbors is their commitment to the furtherance of their museums' educational missions. To handle this responsibility requires a thorough understanding of the museums' collections and their educational purposes, so that the managers can properly select or develop products that relate to them. Managers must compile educational information on the products and train the sales staff to use that information in their interpretations.

Numbers, charts, and graphs have a way of intimidating a lot of people. The author has taken great pains to make them easy to understand, even for those who have no formal retail training and whose high school math is hazy. There is a well-presented glossary with easy-to-follow formulas in the back to help readers who are unfamiliar with some of the terms and numbers.

An entire chapter is devoted to the effect that increasing the size of the store has on revenues. There is a short exercise to help museums that are toying with thoughts of expansion to decide whether it is really in their best interests.

The author discusses factors that make the store's profits appear smaller than they really are (membership and employee discounts and the inventorying of products from other departments) and urges the museum's policy-makers to change procedures so that the store can be reviewed accurately on its own merits. The costs of the discount programs would be borne more fairly and more accurately by the membership department and the personnel department where they originated. Nor should the cost of the museum's publications be absorbed by the store. Many museums develop and print publications, then charge the inventory directly to the store and hold the manager responsible for inventory management. The author suggests having the publications department inventory its own books and sell them to the store as needed, thus placing the responsibility for the dollar investment with the department that made the decision to spend that money.

Financial Analysis for Museum Stores is not a "how-to" book on store management. No instructions on how to take an inventory are given; no techniques for managing employees. Its purpose is to give the reader the ability to evaluate how successfully the museum's store is managed. Financial. analysis worksheets for the reader to use each year are placed at the end of the study. The author advocates annual reviews to hone in on trouble spots, and he encourages experimentation and change. The real value of this booklet is that it allows you to answer the nagging question, "How are we doing?" and guides you toward a plan for future improvement.

My first thought was that $20 for a fifty-page booklet was a bit steep. My second thought, after having studied the booklet, was that it may be the best $20 your museum store will ever invest in its future.

HN

Mary Miley Theobald is the director of Museum Store Consultants and an adjunct professor of museum studies at Virginia Commonwealth University.

FIELD NOTES

FOR THE CURATOR

"Walt Whitman knew you'd be looking at his portrait," says Marilyn Oser, a writer in the development office of Sleepy Hollow Restorations. "The poet had an uncanny certainty of his future fame and influence, and it mattered to him greatly how future Americans would perceive him, both as a nineteenth-century man and as a poet for all time."

As director until September 1986 of the Walt Whitman House, a New York State Historic Site in Huntington, Long Island, Oser hit upon an interesting mix of portraits of "the good gray poet" and Whitman's own observations about them. In the exhibit, entitled "To Confront a Portrait," she was able to interpret the man himself.

"This exhibit illustrates well the particular kind of interpretive complexity one faces at a literary-historic site. The portraits may be seen as material artifacts from the past, depicting a man now long since dead; they may be studied as exemplars in the art of portraiture," says Oser.

She realizes, though, that people who visit the site do not come to be steeped in a time gone by but in the poet himself. "Their interests are rather closer to Whitman's own: they come to gain a richer sense of the spirit of Walt Whitman, the poet—to look him squarely in the eyes, as it were, even across the gulf of a century. Herein lies the paradox.

"Material culture at Walt Whitman House must be interpreted both as it exists in time and as it represents those things that are timeless," she continues. "On one hand, the vernacular farmhouse, built in the early nineteenth century, represents a style of architecture typical of its time and place and thus illustrates the lives of people who lived in that time and in that place. But on the other hand, the house is important today primarily because it is the birthplace of a poet, and *his* works have interest insofar as they defy time and space, speaking to each generation as if it were the first to hear him."

"To Confront a Portrait" combines the author's time with his timelessness. Through a series of portraits on canvas and later photographic versions, the story visitors learn is Whitman's need to capture the "heart's geography's map."

COURTESY OF THE WALT WHITMAN HOUSE

At the Walt Whitman House in Huntinton, Long Island, New York, a new exhibit interprets Whitman's time and his "timlessness." The engraving above was used as the frontispiece of the first edition of Leaves of Grass *in 1855.*

"Just as he kept reworking *Leaves of Grass* through eight separate editions, always seeking to find the perfect expression of himself for coming generations of readers," Oser explains, "so, in the same way, he kept seeking the portrait that would finally and thoroughly sum him up for all perpetuity."

FOR THE ADMINISTRATOR

"Employees in formally organized institutions respond to two entirely different kinds of reference groups," says Dennis K. McDaniel of Beaumont, Texas. "One kind of staff member, the 'cosmo' or 'cosmopolitan,' thinks in terms of his or her peer group, whether inside or outside the place of employment. The second group, called the 'locals' for short, has as its reference group the organization itself and its hierarchy."

McDaniel explains that he first learned these ideas from Andre Delbecq, a professor at the University of Wisconsin School of Business, and that he has found them to be useful analytical and operational tools in personnel management.

"Using our imagination, we can identify employees in both categories in our museums and historical organizations," he says. "Curators doing abstruse research, exhibit designers who are on the leading edge of installation creativity, and educators developing innovative and effective programs might be just a few of the kinds of staff who are conspicuously 'cosmos.' Any AASLH conference proves the validity of this observation; our colleagues who operate in small, or even one-person, shops are clearly desperate to share their accomplishments and to receive psychological rewards and encouragement from their peers. They may be well praised in their own communities, but they still look to the outside for verification of their competence and worth."

On the other hand, "locals" are not so visible at conferences nor are they so eager to have the results of their work published in professional magazines or journals. Examples of jobs where locals are most often found are administrators, office managers, security chiefs, development people—jobs that McDaniel says are "more readily transferable from museums or historical agencies to other fields. These employees think largely in terms of their own organization, its needs, and its leader, and less about external or peer group validation."

McDaniel says that the "cosmo-local" distinction extends, in many cases, to boards of directors. "Boards of trustees of local or state historical organizations are almost by definition prime examples of 'locals.' Failing to understand the 'local' interests of the board of trustees may mean that the professional staff members will be seriously at odds with the board as they seek to establish and carry out their own agenda for the organization. The cosmopolitan viewpoints that professional state and local history personnel bring to their work can bring great rewards to such individuals but may tend simultaneously to separate them from the

FIELD NOTES

'local' purposes of their own organizations."

McDaniel advocates that "professional staff must recognize that most local communities and local boards of trustees are not very interested in accomplishments extending beyond their jurisdictions, at least where history is concerned. Directors must design programs and goals that will satisfy the legitimate local interests of their boards and communities, but they must also provide satisfactory professional recognition for their own staffs."

FOR THE LOCAL HISTORIAN

This month's "For the Local Historian" comes from Carol Kammen, author of AASLH's new book, On Doing Local History: Reflections on What Local Historians Do, Why, and What it Means. *As a local historian in Ithaca, New York, Kammen also teaches local history at Cornell University.*

What benefits might local historians expect from membership in a national history organization? By the very nature of our work, our activity appears to be self-contained. What need have we of an organization such as AASLH?

As I see it, there are many reasons to associate with a professional group; there is much to be gained. While our work is separate and discrete, our needs are similar and our situations alike—whether we are in Montclair or Monterey. A national organization helps lift us out of our own world into a realm where we can learn from others in similar situations, where we can stretch our knowledge of what we are doing, and how we are doing it, where we can learn new skills to apply in our own hometowns.

A national organization gives us the opportunity to communicate our needs—those questions that arise when we delve into local archives or approach touchy local questions or wonder how to mount an exhibit. We can, in fact, sample other's experience by means of a letter to the editor or a request that a topic be explored by the editorial staff.

Moreover, a national organization can do many things for us that we cannot do ourselves. Awards and prizes to those who practice local history in noteworthy ways are important in encouraging and rewarding excellence. Seminars and annual meetings address our interests.

By being inside a national organization, we can ask for the help we need, and we can suggest topics, seminar programs, books, articles, pamphlets, and other tools necessary to our work. We can, in effect, vote by writing letters asking for services and noting with approval those in place that meet our needs. We can request that some local historians serve on the committees of national professional groups.

It is time for local historians to professionalize. We might be amateur historians—that is, people who love the doing of history—but we seem to conduct ourselves in a scrupulous manner, and our needs are expanding as interest in local history grows. It is time to join ranks, to be alert to what other local historians are doing, to consider the ethics of local history, and the explore new techniques. The best way for us to accomplish this is by activity within a national organization.

FOR THE ARCHIVIST

"Historians have an adage: 'No sources, no history.' In a great many cases this comes down to 'No newspapers, no history.'"

So says Walter Nugent, the Andrew V. Tacks distinguished professor of history at Notre Dame University. Nugent was an early advocate of Indiana's newspaper project, designed to locate and preserve all the state's newspapers. Indiana is among twenty-four states and two territories involved in a long-range program funded by the National Endowment for the Humanities to make three hundred years of the nation's news available to the public and to historians.

Newspaper publishing in Indiana began in 1804 with *The Indiana Gazette,* a weekly printed in Vincennes. Project staff members thought they would eventually find some 3,200 titles, according to Sally J. Rausch, project director and associate dean for technical services at the Indiana University Libraries in Bloomington. But their initial estimate climbed to 5,500. They discovered, for example, that the present *Banner Graphic* in Greencastle had thirty-two ancestor newspapers between 1852 and 1970.

Sometimes newspapers are found that served communities no longer existing. The project has catalogued the first issue of the *Marble Hill Era,* published in that southern Indiana community on April 5, 1894. Observes Marvin D. Williams, the principal cataloguer for the project, "Marble Hill no longer exists as a town. Its history is preserved only through it newspapers." He adds that the *Era*'s slogan was "Not for love, honor, or fame, but for Cash."

In addition to Indiana University, other organizations participating in the project include the Indiana Historical Society, the Indiana State Library, and the Indiana Cooperative Services Library Authority. A number of substantial gifts to the project and an appropriation from the state legislature also support the preservation work.

NEH has granted $6.4 million for newspaper preservation projects to date, including $1.48 million just announced for Arkansas, Colorado, New York, Ohio, Pennsylvania, and Wisconsin.

"Up to now there has been no comprehensive program for locating, cataloguing, and preserving the wealth of information in the nation's newspapers," observes NEH Chair Lynne V. Cheney. "Now, through the United States Newspaper Program, many of the historical and cultural riches locked away in our newspapers are being brought to light. Thousands of newspapers have been located and catalogued for the first time and made available to scholars, students, genealogists, and the general public."

NEH's next deadline for grant applications under the U.S. Newspaper Program is June 1. For more information and application forms, contact the U.S. Newspaper Program, Office of Preservation, National Endowment for the Humanities, 1100 Pennsylvania Avenue, N.W., Washington, D.C. 20506, (202) 786-0438.

FIELD NOTES

FOR THE PRESERVATIONIST

Out of scrapbooks, unpublished notes, old maps, photographs, and artifacts, the research staff of the Rochester Museum and Science Center has assembled a detailed picture of 10,000 years of settlement along the Genessee River in upstate New York.

Project Director Brian Nagel, with associates Frank L. Cowan and Mark Drumlevitch, also interviewed experts and tracked down objects dispersed throughout the country. The result is the *Cultural Resources Inventory for the Local Waterfront Revitalization Program, City of Rochester, Monroe County, New York*. Its 360 pages constitute a comprehensive survey of historical and archaeological sites near the Genessee. Here are recorded old foundations, canal beds, docks, and remnants of lost communities.

The survey will help shape Rochester's policy toward its waterfront. For historians, though, the study's usefulness lies in what it reveals about the past of the Genessee and Lake Ontario, where the river empties.

For Bill Davis, a retired Eastman Kodak engineer and a local river expert, the diagrams and pictures tell about the area as it now appears, as it looked to earlier generations, and as it could potentially be. Davis has played a major role in uncovering the history of six settlements that preceded Rochester. All had wharves and mills and raceways—visible now only in worn conduits and archways and engravings, documented in the RMSC inventory.

Wanting to see the river's history preserved, Davis is promoting the development of a continuous hike and bike trail along the Genessee. He has worked to create an annual "Rediscover the River" day, written articles, and created slide shows with views of old foundations and deserted factories and gravestones, recently eroded by acid rain.

Looking out over the Genessee's Lower Falls, Davis observes, "This is a perfect spot for an overlook, for an urban cultural park for all of us to enjoy our natural resources and appreciate those who lived here before us. So much has been obliterated; so much of our history has been lost."

The RMSC inventory grew out of Rochester's waterfront revitalization program, which in turn received impetus from state and federal laws to encourage local governments to identify opportunities, problems, and issues in the use of their riverfront lands. Brian Nagel and his team acknowledge Davis's contribution to their work. "Without Bill's passion for this river," Nagel says, "many irreplaceable cultural resources in the form of historic sites and natural parks would have been lost."

FOR THE EDUCATOR

Educating the education assistants plays an important role in the overall program of a historic site or museum. By education assistants, we mean those guides, docents, or volunteers who take your message directly to your visiting public. Often strapped for funds to develop public programs or new exhibits, small museums sometimes forego this important education process. Two small organizations in Pennsylvania worked out a solution. They collaborate on the Trans-Susquehanna Conference for Museum Guides.

Each year the Hershey Museum of American Life in Hershey, Pennsylvania, and the Historical Society of York County, located forty miles away from the museum on the other side of the Susquehanna River, bring together nationally known museum professionals and other specialists to discuss museum interpretation at a one-day conference.

"Contributing to the problem presented by lack of funds," says Gail L. Dennis, curator of education at the historical society, "is the fact that a small museum might have only five or ten guides compared to the fifty or more at a larger museum. With such a small audience, many continuing education programs are not cost-efficient or feasible."

Collaboration was the key that the historical society and the museum used to solve the problem of training their small numbers. "Continuing education for guides at first seems an unlikely prospect for a cooperative project since the topics guides want to know more about usually are so closely tied to a particular museum's collections. But there are many subjects relating to the theory and practice of museum interpretation that are of interest to guides from museums of all types.

"The Trans-Susquehanna Conference has developed over the last four years into a hybrid rather than a pure form of cooperative programming," Dennis continues. "The Hershey Museum and the HSYC continue as cosponsors with their educators coordinating and publicizing the event, but participation is not limited to their guides." At the first conference, more than twenty organizations—many of the all-volunteer variety—were represented.

Topics addressed over the last four years include using questions as an educational tool, the developmental stages of children, self-evaluation for guides, the elements of successful museum interpretation, engaging visitors in object study, and the needs of elementary students and teachers.

Dennis reports that the largest expense incurred during the conference is for speakers' honoraria and travel. "The budget of the conference has ranged from $350 to $900 depending on this variable. The registration fees that support outright costs have varied from $7 to $12.50."

The word has spread of the Trans-Susquehanna Conference's success. Using the conference as a model, the Brandywine Region Museum Educators' Roundtable in Wilmington, Delaware, and Historic Germantown Preserved in Philadelphia both supported similar programs for museum guides in their respective regions.

Dennis sums up the advantages of cooperative education programs for guides by saying that the participating organizations can serve a larger audience, share expenses and planning tasks, attract top speakers, and allow guides to meet their colleagues from neighboring museums. "A joint program fosters inter-museum cooperation while encouraging guides to become better at their jobs—two worthwhile goals for any museum." **HN**

The American Association
for State and Local History

. . . helping museums and historical agencies save and use significant historical resources. . .

Membership in AASLH brings you a subscription to the bimonthly HISTORY NEWS magazine and the monthly HISTORY NEWS DISPATCH newsletter and discounts on AASLH publications and educational materials. As an AASLH member, you will also receive invitations to annual meetings, voting privileges, and announcements of professional seminars and other educational opportunities.

Join AASLH today.

Together we can do our work in history better.

YES! **I need the best, most up-to-date NEWS on the world of historical societies, museums, archives, and libraries.**

Sign me up for: ____ new membership ____ renewal membership

________________________________ membership number

☐ individual membership ($40)
☐ student membership ($25). (Send a photocopy of your valid student I.D. card.)
☐ senior membership, 65 or older ($30)
☐ Enclosed is $1 (in addition to my membership dues) to support AASLH's lobbying efforts.

Write or call AASLH, 172 Second Avenue North, Suite 102, Nashville, Tennessee 37201, (615) 255-2971, for institutional and library membership rates.

Please accept my gift or pledge of $______to the William T. Alderson Internship Fund.
☐ Enclosed is my tax-deductible gift.

Name ________________________________

Address ________________________________

City ____________ *State* ____________ *Zip* ____________

To receive information about the companies advertising in this issue of HISTORY NEWS, simply circle the numbers on the attached card that correspond to the numbers printed to the side of the advertisments.

READER SERVICE CARD — HISTORY NEWS

May / June 1987

I would like more information on the items circled below.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60
61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80
81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120
121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140
141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160
161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180

Name ________________________________

Title ________________________________

Organization ________________________________

Address ________________________________

City ____________ State ____________ Zip ____________

Please print your name and address

To receive information about the companies advertising in this issue of HISTORY NEWS, simply circle the numbers on the attached card that correspond to the numbers printed to the side of the advertisments.

READER SERVICE CARD — HISTORY NEWS

May / June 1987

I would like more information on the items circled below.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60
61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80
81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120
121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140
141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160
161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180

Name ________________________________

Title ________________________________

Organization ________________________________

Address ________________________________

City ____________ State ____________ Zip ____________

Please print your name and address

PLACE
STAMP
HERE

Membership Manager
American Association for
State and Local History
172 Second Avenue North, Suite 102
Nashville, Tennessee 37201

PLACE
STAMP
HERE

HISTORY NEWS MAGAZINE
Department RS
172 Second Avenue North, Suite 102
Nashville, Tennessee 37201

PLACE
STAMP
HERE

HISTORY NEWS MAGAZINE
Department RS
172 Second Avenue North, Suite 102
Nashville, Tennessee 37201